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# Wraparound Implementation Guide:



# A Handbook For Administrators And Managers

*By Patricia Miles, Neil Brown, and The National Wraparound Initiative Implementation Work Group. Preface by Janet Walker and Eric Bruns.*

# The Wraparound Implementation Guide: A Handbook For Administrators And Managers

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*The content of the  
Implementation Guide  
was collaboratively  
created and extensively  
peer reviewed.*

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# Preface

Dear Reader,

Since first convening in 2003, the basic mission of the National Wraparound Initiative has been to promote understanding about the wraparound model and its benefits, and to provide the field with guidance that facilitates high quality and consistent wraparound implementation. In its early stages, the NWI served as the convening point for wraparound experts nationally to develop consistent definitions of wraparound, including descriptions of the principles of wraparound, basic activities of the process, and characteristics of supportive communities and systems. More recently, we have committed to more actively support high-quality wraparound implementation by developing and disseminating accountability and quality assurance tools, providing hands-on technical assistance, and developing a membership-based national community of practice.

A few years ago, a workgroup within the NWI began to explore the idea of developing standards for wraparound implementation. However, after initial discussions, the group reached a consensus that it was not advisable to establish hard and fast “rules.” Instead, the group decided that the NWI should develop resources that would provide guidance about wraparound implementation while also recognizing that implementation must be undertaken in a way that fits with the local strengths, needs and resources of individual communities. The workgroup members felt it

was of particular importance to develop practical information that was specifically tailored for managers and administrators who are involved in developing, implementing, managing, funding, or improving community or state wraparound projects. This information would provide guidance not only about what sort of implementation support was needed for wraparound, but also how managers and administrators could go about building the needed support. Thus the idea for a “how-to” manual was born.

As in the past, the NWI relied on the individual and collective expertise of its members to provide content for this new publication. Members of the NWI’s Standards Workgroup took the lead in generating material for inclusion in the proposed manual. Workgroup members were asked to contribute material related to each



of the six “themes” or areas of wraparound implementation: *community partnership; collaborative action; fiscal policies and sustainability; access to needed supports and services; human resource development and support; and accountability*. For each theme, workgroup members provided information regarding key considerations to keep in mind, the most critical things to accomplish, and the biggest dangers or pitfalls to avoid. Once the workgroup members’ contributions had been gathered, we approached two individuals who have extensive experience in supporting wraparound implementation across North America and asked them to synthesize the raw material into a practical guide for supervisors, managers, and administrators.

The result is the current document, the *Wraparound Implementation Guide: A How-To Guide for Administrators and Managers*. The *Implementation Guide* is designed to provide a “road map” for those in program and system oversight roles for wraparound, to help keep them focused on the range of important issues in overseeing effective wraparound practice.

It is important to recognize, however, that supporting wraparound is not a step-by-step process. As described in the introductory chapter, wraparound implementation is complex, and work related to one particular theme is not independent of work related to other themes. Progress in one area can reinforce, allow, or accelerate progress in other areas; and each community will likely have different priority areas to work on at different junctures. Thus, the *Guide* is not designed to be read from cover to cover, but should instead be seen as a working document that one can go back to over time. Toward this end, we have built troubleshooting sections and self-assessments into the *Guide*, so that an administrator or community team can use these tools periodically to check how well they are doing.

One more point is worth making. As Co-Coordinator, we are often asked whether (“when”) the NWI will in fact establish and disseminate hard and fast expectations or “standards” for wraparound implementation, such as caseload sizes, mandated training and coaching activities, necessary staffing patterns, required evaluation measures, and so forth. Indeed, establishing expectations in these areas is important because we firmly believe that the success of every wraparound initiative will be based largely on the nature and quality of the system and program support that is involved. We also have research that backs up this belief. Thus, the NWI wants to be able to actively shape the development of communities, systems, and programs so that wraparound initiatives will succeed and children and families will thrive.

At the same time, we also believe that one of the unique strengths of wraparound is its conceptual adaptability to local needs and its ability to benefit from local innovations. We recognize that every community implements wraparound differently based on unique conditions. This means that, while we need to promote systems and organizations that support wraparound across a defined set of domains, application of overly rigid standards runs the risk of constraining local individualization, adaptation, and innovation. What’s more, with too many rigid standards in place, many communities might decide that adopting the wraparound principles in practice is too costly or not worth the effort, de-railing the movement toward more collaborative, individualized, family- and youth-driven service systems.

To reflect this creative tension, we have taken guidance from NWI advisors and developed the *Wraparound Implementation Guide* in a way that is intended to provide direction on how to achieve accommodating conditions in the six areas of community support without demanding that there is only one way to get there. In

fact, the initial draft was constructed like a traveler’s guidebook – presenting useful maps, tips, and facts without suggesting there was only one route the traveler had to take in order to have a successful voyage. Even though we eventually decided to make the *Guide* more straightforward we think this initial inspiration remains.

We hope the flexible guidance provided here can help you and your community, jurisdiction, or state stay focused on high-quality wraparound implementation across this range of specific, research-informed areas, while still allowing you to take a route that works best for you, your stakeholders, and, most importantly, your young people and families.

Sincerely,

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# Welcome To Wraparound

Congratulations on your decision to develop, implement, or improve your wraparound project. Administering a wraparound project takes a great deal of commitment, time and energy. We are hopeful that this *Implementation Guide* can be helpful to you as you seek to improve services, supports, and outcomes for children and families.

## About the Process

*Wraparound* is a planning *process* that follows a series of steps to help children and their families realize a life that reflects their hopes and dreams. Wraparound also helps make sure children and youth grow up in their homes and communities. It is a planning process that brings people together from different parts of the family's life. With help from one or more *facilitators*, people from the family's life work together, coordinate their activities, and move closer together in their view of the family's situation. This process of coming together always includes the family as a central partner in building a coordinated view.

Since the term was first coined in the 1980s, "wraparound" has been defined in different ways. Wraparound has been described as a philosophy, an approach, and a service. Wraparound can feel like a moving target because it is designed to adapt to the contexts of different types of communities and systems as well as the needs of individual families.



In recent years, wraparound has been most commonly conceived of as an intensive, individualized care planning and management process. Wraparound is not a treatment per se. The wraparound process aims to achieve positive outcomes by providing a structured, creative and individualized team planning process that, compared to traditional treatment planning, results in plans that are more effective and more relevant to the child and family. Additionally, wraparound plans are more holistic than traditional care plans in that they are designed to meet the identified needs of caregivers and siblings and to address a range of life areas. Through the team-based planning and implementation process, wraparound also aims to develop

the problem-solving skills, coping skills, and self-efficacy of the young people and family members. Finally, there is an emphasis on integrating the youth into the community and building the family's social support network.

# About This Guide

**T**his manual is organized into six units which correspond to the six necessary conditions for wraparound implementation as defined by the NWI through a consensus process. These areas of necessary community support include *community partnership; collaborative action; fiscal policies and sustainability; access to needed supports and services; human resource development and support; and accountability.*

The **Community Partnership** unit focuses on key features for establishing collective ownership of and responsibility for operation of the wraparound effort. Options for developing effective structures and processes that facilitate such partnership and oversight will be covered.

The **Collaborative Action** unit discusses ways to maintain joint ownership of the wraparound effort. This will include activities that cut across systems while also addressing vertical ownership from administrative levels to supervisory levels.

The **Fiscal Policies and Sustainability** unit is focused on aligning resources and creating policies and procedures that support wraparound implementation. This unit will not discuss in detail the range of funding streams that can be aligned to support wraparound (you can look to the NWI website for many such examples: [www.nwi.pdx.edu](http://www.nwi.pdx.edu)); instead, it will review process steps to make sure that enough resources are available to support quality implementation. Key challenges and

suggestions for ensuring an integration of fiscal and program concerns will be addressed.

**Access to Needed Supports and Services** is a unit that crosses over to practice areas as well as policy and management areas. Effective administrators and managers must focus on structural and resource issues (such as the nature of the local service array) to make sure families served through the wraparound process have “just-in-time” access to needed supports and services or the initiative runs the risk of only planning, without following through. If a range of service and support responses is not available, chances are great that the local project will fail to realize hoped-for outcomes.

The **Human Resource Development and Support** unit is focused on the “people issues” associated with Wraparound implementation. While there are key capacities any wraparound project should have, the range of staffing options varies widely from site to site. What is *always* true is that wraparound staff need support and direction. The project should also seek to ensure that partner agency personnel are aligned with the goals and activities of the wraparound project.

The **Accountability** unit is designed to provide an overview of how a wraparound project is monitored and evaluated. Experience has taught us that newly implemented wraparound projects should construct a clear set of expectations regarding accountability and find ways to use data to improve the project. Accountability creates an opportunity for wraparound managers and stakeholders to make adjustments to ensure effective implementation.

## Before You Get Started: Resources for Right Now

### State Level

Most of the 50 states have legislation and/or administrative regulations that reference wraparound. This formal reference can range from regulations that describe the wraparound process (California) to training efforts (Arkansas) to funding initiatives (Oregon) to an organized statewide network of local initiatives that implement wraparound (Massachusetts). Even if you are not directly involved in state-supported wraparound efforts it is often useful to make contact with the state representatives who are involved with wraparound. This will allow you to identify resources, rules or regulations that you can use to support your implementation.

## County Level

You are likely to find wraparound or wraparound-like activities housed within certain county organizations. Some will involve local child welfare or mental health authorities while others will be found through local schools or juvenile court sponsored activities. Making contact with your local resources is likely to create an opportunity for shared understanding, as well as the possibility of sharing resources – once you have completed this *Implementation Guide*.

## Private Providers

A number of private providers have worked diligently to integrate the wraparound philosophy in all of the work they do. If you are aware of who is practicing in your community, it would be wise to determine whether they are using the wraparound process, and in which settings. Some mental health outpatient providers have developed an array of wraparound responses for a wide range of populations from children/youth to older adults. Building a network of wraparound friends will allow you to share not only resources but a range of lessons learned about wraparound practice and management. Take the time to learn lessons from other providers as you reflect on your own participation.

## Community and Family Organizations

Community organizations, especially family organizations, may also serve as a good opportunity to gather information. Family organizations have long been advocates of quality implementation of wraparound on a national, state and local scene. Check out your state or local Federation of Families website to see if they have feedback and information about other resources that could be accessed as you get started with this *Guide*.

## A Note About Definitions

One word of caution is around the use of the term “wraparound.” Wraparound is used in a variety of ways. Some states may have regulations that refer to wraparound *services*. This term usually represents a set of flexible, community-based and often billable services that are used to support people in their homes and communities. A second use of the term is wraparound *philosophy* or *approach*, which generally means that some type of human service is intended to follow the Ten Principles as articulated by the National Wraparound Initiative (see [www.nwi.pdx.edu/pdf/](http://www.nwi.pdx.edu/pdf/)

TenPrincWAProcess.pdf), and/or other values. Pertinent to this use of the term, it is possible to follow many of the same principles in other service sectors (clinical, educational, justice, health, etc.) and still not implement the full wraparound process. The wraparound process is the model that is most directly discussed in



the materials of the National Wraparound Initiative, and refers to a family-determined, individualized, team-based care planning and coordination process that resembles the description provided by the NWI.

The existence of multiple and overlapping definitions of wraparound can be frustrating and confusing to leadership. But it is also reflective of the dynamic, grassroots, and adaptive nature of the wraparound concept. Understanding and being able to describe these different reflections of wraparound can serve to deepen your understanding of what the process should look like as you strive for quality implementation.

## Deciding Where to Start in the Implementation Manual

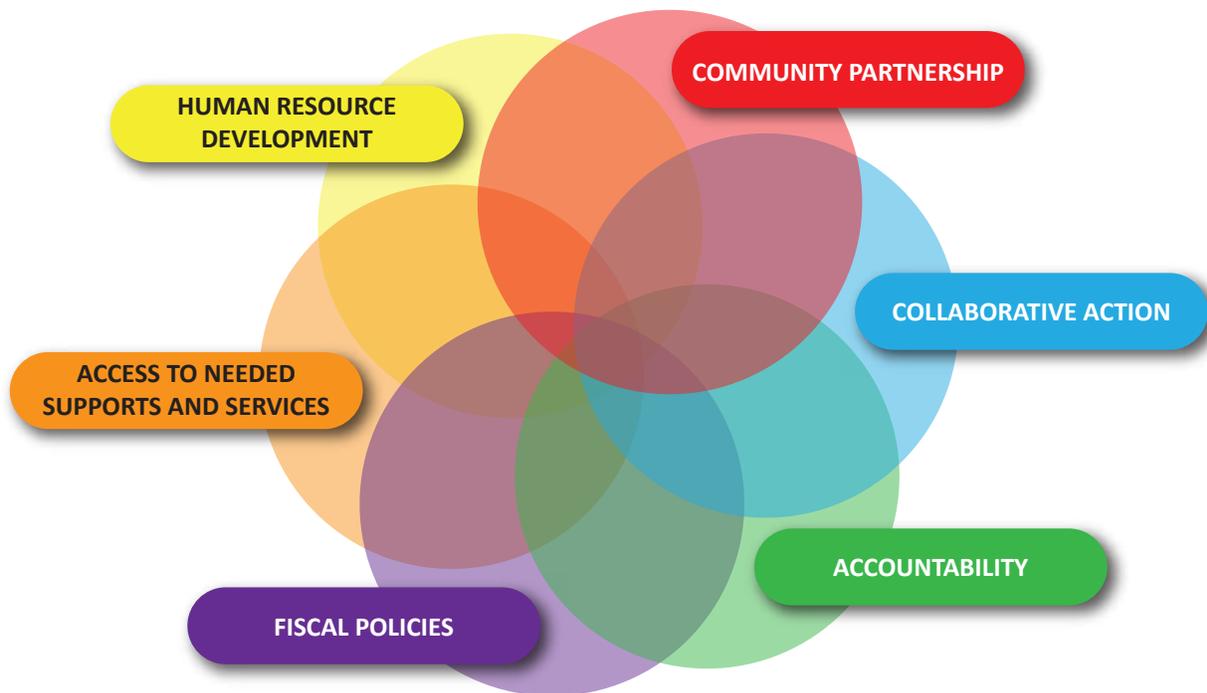
This section is designed to provide a basic overview of wraparound implementation, and to introduce you to the types of information and resources that are offered in the “Implementation Support” section of the NWI website (see [www.nwi.pdx.edu/overall.shtml](http://www.nwi.pdx.edu/overall.shtml)).

### 1. What are the main things to plan for in wraparound implementation?

Every community implements wraparound differently, based on its own unique local conditions. However, each community also needs to accomplish a set of core implementation tasks in various areas, such as setting goals, funding the wrap-around effort, hiring and training staff, tracking outcomes, and so on. There are no rules about where a community or initiative must start in terms of building wrap-around infrastructure; however, research and experience tells us that it is critically

important that these supports get put in place.

This *Implementation Guide* is structured around six implementation areas or “themes” that have been identified in research using the *Community Supports for Wraparound Inventory* (CSWI). All communities or wraparound initiatives implementing a full wraparound process must attend to these six themes. The six themes are: *community partnership*; *collaborative action*; *fiscal policies and sustainability*; *access to needed supports and services*; *human resource development and support*; and *accountability*. Within each theme, there is a series of “necessary conditions” that communities typically need to have in place in order to support high quality wraparound.



The sections of this *Implementation Guide* each relate to one of the six themes. In each section, there is a set of frequently asked questions that provide a kind of overview of important areas of work, key considerations, and pitfalls to avoid. Additionally, each section includes references to resources that provide a deeper level of detail on key topics within the theme. An online version of this *Guide*, found at [www.nwi.pdx.edu/implementation.shtml](http://www.nwi.pdx.edu/implementation.shtml), provides active links to these online resources. In general, the NWI’s *Resource Guide to Wraparound*, found at [www.nwi.pdx.edu/NWI-book/index.shtml](http://www.nwi.pdx.edu/NWI-book/index.shtml), provides a host of more detailed examples of high quality implementation.

## 2. Where do we begin?

Developing community capacity to implement and support wraparound is a developmental process, and work is typically ongoing in each of the six areas. Still, every community needs to get started somewhere. A good first step is to review what sort of groundwork your community or system has laid for wraparound thus far, and to identify areas of greatest strength or capacity as well as the areas of greatest need. You can use the *Community Groundwork for Wraparound Implementation* self-assessment in Appendix A as a tool to help you review your community's strengths and needs.

Consider the results of your self-assessment. You may choose to start by working on areas of strength because that may give you the most significant gain right away, or you may choose to start by focusing on the area of greatest challenge so that your wraparound efforts can have a firm foundation across implementation areas.

There is no right order or single right way to address these themes, but some themes are more interrelated than others. For example, while *community partnership* and *collaborative action* are interrelated, they also represent some unique attributes and activities. The *community partnership* theme speaks to formal arrangements and relationships between community stakeholders while *collaborative action* references actions that grow out of the partnership. Community partnership is often necessary for creating the range of imaginative and family-centered responses that is identified in the *access to needed services and supports* theme. It could also be argued that a community or project won't have a wide range of responses available unless partners take collaborative action to develop coherent financing schemes as articulated in the *fiscal policies and sustainability* theme. Finally, all of the themes are not likely to make much difference unless a well-supported workforce is dedicated to the implementation of wraparound in your community.

The point is that, while the themes are significantly intertwined, each community has to choose to start somewhere. After thinking about your community's strengths and needs for improvement, choose a theme and go to the appropriate section of this resource. This represents a starting place rather than an ending. Wraparound is often referred to an aspirational model; you are not likely to reach perfection in any of the themes outlined in this *Guide*. Progress, however, can be made and is required to ensure effective quality of implementation of wraparound practice for each family you support.

### 3. What if we need more help?

Many times, wraparound projects turn to consultants, trainers and technical assistance providers to provide the level of customized and intensive assistance that goes far deeper than even a comprehensive set of static implementation resources. Yet, it is sometimes difficult to locate a consultant that matches a particular project's needs. The NWI maintains a listing of consultants that is intended to serve as a resource to projects as they explore options for consultation. This information has been submitted by the consultants themselves, and includes both NWI advisors and other people not affiliated with the NWI. Consultants appear in no particular order. We strongly encourage you to read the *Resource Guide* article on “Choosing a Consultant to Support Your Wraparound Project” (Chapter 5a.3) before purchasing consultation, training, or technical assistance services.

The NWI may also be able to help a local or state initiative directly. One way in which we can do this is to support the accountability function of wraparound implementation. At a community or system level, the NWI has developed the *Community Supports for Wraparound Inventory*—which provides information on the level of development in the six themes of wraparound support—and a procedure for supporting web-based data collection from local stakeholders. At a practice level, the Wraparound Evaluation and Research Team at the University of Washington disseminates several implementation fidelity measures. (You can go to [depts.washington.edu/wrapeval](https://depts.washington.edu/wrapeval) to learn more.) Finally, the NWI has partnered even more actively with a number of local and state wraparound projects. For some examples, go to our page on the NWI across the USA. We look forward to collaborating with you!

## A Quick List of Wraparound Terms for Managers

**Wraparound process:** An intensive, team-based, individualized care planning and management process that follows a series of steps and considers a set of unique inputs to help children and their families realize a life that reflects their hopes and dreams.

**Wraparound principles:** A set of 10 statements that defines the wraparound philosophy and guides the activities of the wraparound process.

**Wraparound approach:** Informed by the wraparound principles. When the principles of wraparound are purposefully applied to services or supports that are



different from the full wraparound care coordination process (e.g., child welfare case work, day treatment, case management) we often refer to these services as adopting a wraparound *approach*.

**Flexible services:** A term that is often used to describe flexibly funded or delivered in-home activities. Any number of community-based services can be included in this definition, ranging from in-home workers, respite care, transportation, mentoring or other creative community-based approaches.

**Community team:** A group of stakeholders from across interest groups who provide leadership, strategic planning, support, sanction, and accountability to your wraparound

process. Members of the community team typically include representatives of child-serving systems, provider organizations, family advocacy organizations, community and business groups, and representatives of the children and families served by the system or wraparound initiative.

**Wraparound teams:** Also known as child and family teams, these are groups of people – chosen with the family and connected to them through natural, community, and formal support relationships – who develop and implement the family’s plan, address unmet needs, and work toward a collective team mission that reflects the family’s vision.

**Flexible funds:** Dollars that are available to individual child and family teams that can be used to provide flexible, creative or unique services, supports or strategies.

**Wraparound staff positions:** The range of staff assigned to implement the wraparound process on the child and family level. Wraparound staffing can range from one position such as a facilitator or care coordinator who is responsible for putting the process together for each family to a group of multiple staff persons that might include family support partners, youth partners and/or behavioral specialists.

Wraparound staffing varies from site to site but all sites must have the capacity to

have someone take on the primary role for putting the process together.

**Facilitator:** A person who is trained to coordinate the wraparound process for an individual family. This person may also be called care coordinator, navigator, wrap-around specialist, resource facilitator or some other term. The person in the facilitator role may change over time, depending on what the family thinks is working best. For example, a parent, caregiver, or other team member may take over facilitating team meetings after a period of time.

**Wraparound fidelity:** How fully the wraparound process (whether it is for a family, in an organization, or in a whole system) adheres to the 10 principles and basic activities of the wraparound process. Can be measured using fidelity tools such as the *Wraparound Fidelity Index* or *Team Observation Measure*. Wraparound fidelity should not be considered synonymous with wraparound quality; a wraparound team or initiative that scores high on getting the basic wraparound “steps” done may still need improvements in the quality of its work.

**Community supports/necessary conditions:** Conditions at the system or organizational level that need to be in place to ensure that the wraparound process for individual families is likely to be well-implemented and succeed in achieving positive outcomes. Community supports fall into six themes: *community partnership*; *collaborative action*; *fiscal policies and sustainability*; *access to needed supports and services*; *human resource development and support*; and *accountability*.

# Theme 1:

## Community Partnership

**According to the Community Supports for Wraparound Inventory, community partnership in wraparound is defined as *collective community ownership of and responsibility for wraparound that is built through collaborations among key stakeholder groups.***

As conceived by the National Wraparound Initiative, implementation of wraparound requires attention to six types of community supports. One of these areas is *community partnership*.

This section provides information regarding how stakeholders involved in the wraparound effort do things such as: choose a collaborative structure, manage this structure, use this collaborative structure effectively, and support stakeholders to participate effectively.

### **1. What kind of collaborative structure should we use?**

The ideal platform for wraparound implementation involves some sort of collaborative structure – often known as a “community team” – in which decisions are made. A community that is interested in building wraparound capacity has choices in establishing the collaborative body. These options include:

- » **Finding an existing collaborative body.** Wraparound projects don’t operate in a vacuum. Many communities may already have collaborative structures in place

that can be tapped in building cross-community support for the project. You may find that linking with an existing effort is the most efficient and effective way to get your project off the ground while getting it recognized as a valid effort.

- » **Creating a new collaborative body.** You may also find that existing collaborative structures don't have the right mix of participation, decision-making processes or focus. In this case, you may elect to create a collaborative body that will provide a platform for launching wraparound efforts.

Whether you link up to an existing structure or find you need to create a new entity, certain characteristics and capacities are necessary. These include:

- » **A representative group of stakeholders who are able to collectively take responsibility for task oversight** including project design and risk assumption, as well as for project guidance through obstacles and challenges. Structures associated with quality wraparound implementation *always* include a place at the table for youth and families who are receiving services and/or advocate for the interests of youth and families who are engaged in services. Like all members of the collaborative structure, families and young people should be provided with support and training so that they can participate fully and comfortably in these roles.
- » **Relevant expertise with representatives who are able to participate in decision making.** Collaborative bodies should include a range of representatives from within social service circles, but should also include representatives with a range of perspectives outside of those circles. Examples include representatives of business and cultural organizations and groups, philanthropy, higher education and youth and families. Good representation at the collaborative body level should reflect the diversity of the community.
- » **Authority to actually make decisions that are followed in terms of program design** and the capacity to commit financial, programmatic and staff resources to the implementation of the project.

## 2. What are the steps for preparing a wraparound collaborative partnership?

Merely convening a community collaborative body is not enough to ensure its success. Wraparound can be conceived as a proactive systems change process (see



Chapter 5.b by John Franz in the NWI's *Resource Guide to Wraparound*) that requires effective functioning of the collaborative body. The following are a few points to keep in mind:

» **Set a clear purpose.** You should work with stakeholders to set a clear purpose for the project including defining who will be helped, how they will be helped, and what the results of the help will be.

» **Build efficiency of effort.** Keeping the collaborative body together requires attention to efficiency. You should be mindful of people's time spent in meetings, and the relevance of the issues and decisions considered. Decisions put in front of the group should be decisions that group

members are authorized to make; otherwise, you will be taking people's time to discuss areas they have no influence over. It is also important to remember that everyone wants to feel useful. The wraparound project should create ways for members of the collaborative body to make a difference.

» **Develop a method to ensure stakeholder representation.** Some steps in a wraparound implementation are nonnegotiable. These include the participation of families, youth and system providers. Other participants are critical but should be tailored to the strengths, needs and context of the community. Consider participation vertically, including identifying what layer of an organization is most effective for the job at hand, as well as horizontally, by including individuals who represent a broad spectrum of participation. Get specific about how you will make sure that participation is balanced and broad based while always ensuring that families are clearly listened to and represented.

» **Match your structures to meet your purpose.** Effective wraparound implementation requires a blend of structure and participation. Because wraparound represents change at the practice or direct family level while concurrently forcing change at the management and system levels, you will have to make decisions



about how to implement the right-sized partnership structure. Some communities develop very simple structures in which mid-managers meet twice monthly for the purposes of ratifying enrollments and conducting open discussion about challenges. Other communities will develop more complex structures that entail multiple levels of participation (managers, administrators, practitioners, supervisors, families and staff types) that address the mechanical aspects of wraparound but also form fairly ambitious system change and improvement activities. Still other projects will start with a single sponsor who agrees to support and champion efforts.

While the absence of a structured community body doesn't preclude getting started with wraparound, the presence of such a body can make implementation more effective and consistent. The key point is to start with what you have and continue to work towards effective partnership. For an example of one community's approach to developing a community team, see Chapter 5.f by Andrew Debicki in the *Resource Guide to Wraparound*.

### 3. What activities should our community collaborative structure(s) undertake?

The community collaborative structure (often referred to as a "community team") can serve a number of roles. The focus of community teams ranges from setting goals to intake to monitoring the project for quality. The following items should be considered in every wraparound project:

- » **Referral, enrollment and assignment.** These activities are about making sure that families and other stakeholders have a clear pathway to enter wraparound. This includes setting forth enrollment criteria, setting a process to ensure that families are gaining access to wraparound in a timely fashion, and ensuring that families are matched to individuals or organizations that are likely to provide

quality services. Specific areas to address include:

- + **Population of focus.** Setting the target for who should be helped through the wraparound process. This should include the characteristics and indicators of families who everyone can agree need this type of practice.
  - + **Gatekeeping.** Creating a process to ensure that the right family situations are making their way to the people who are operating the wraparound project. This process will often involve a group of stakeholders reviewing referrals to ensure that youth and families are never rejected from the process for being seen as having too much need – or to ensure that families who enter wraparound have adequate levels of need to justify their enrollment in the project. In some communities this may include other system processes such as assessing medical necessity.
  - + **Assignment.** This function can be housed within the community team or can be assigned to the organization that is responsible for wraparound implementation. In larger communities that have multiple providers, this may entail blind assignments or matching to the anticipated needs of the family. In smaller communities in which one provider is responsible for wraparound implementation, this will often involve the supervisor or manager assigning a newly enrolled family to the right complement of staff.
- » **Quality management.** Managing quality in wraparound is an ongoing part of the process. The community team should ensure that quality is addressed and is a major focus of activities. This is done in the following areas:
- + **Plan review.** Some sites will have each plan of care reviewed by the community team during the initial two years of operation. This is helpful in establishing consensus about quality. It can also be dangerous if the community team tries to make major changes to the plan. Though a community team may wish to have this level of oversight, it is important that the wraparound (child and family) team that is uniquely constructed for each family can serve as the decision maker for what is needed. The community team, however, can set quality benchmarks and review plans to make sure that every plan completed addresses quality elements.
  - + **Outcomes tracking.** Effective community partnerships will pay attention to outcomes as they occur rather than waiting for an end-of-year report. Depend-

ing on the number of families enrolled in your project, tracking outcomes can be a struggle unless you have created a method for paying attention on an individual level. As discussed in this *Guide's* section on *accountability*, it is helpful to set benchmarks that address living situation, school attendance and other areas upon completion of wraparound.

- + **Provider network and the array of services and supports.** Good provider networks are broad based and well balanced. The community team will need to be able to oversee the development of a provider network that provides a range of treatment services, support services, and community services, ideally based on data from families, wraparound plans, and facilitators about what service and support options are currently available and of high quality and what are not. This will undoubtedly be a developmental process and will occur slowly, but it should be actively attended to by the community team (See more in section on *access to needed supports and services*).
- + **Fiscal oversight and sustainability.** Effective wraparound initiatives are able to manage, blend and braid funds from a variety of sources. When this doesn't happen centrally, wraparound providers often march to two or more masters in the form of funders. The community team should be well-informed about, oversee the blending or braiding of, and monitor the use of different funding streams to ensure sustainability, flexibility, and that providers are adhering to the wraparound principles regardless of the different sources of funds that are used to finance the initiative. (See more in section on *fiscal policies and sustainability*).

#### 4. How can we support stakeholders to participate effectively in the collaborative process?

Effective community partnership involves more than having people attend meetings. Strategies for ensuring effective participation include:

- » **Ensuring that individuals have the right information and orientation to the setting they are in.** This includes ensuring that individuals participating in the community structure have a common understanding of wraparound as well as verifying that they are sanctioned to participate.
- + Develop and distribute written materials to encourage common understanding.

- + Set aside time to allow people to get to know each other as individuals.
- + Take the time to orient members until you are satisfied there is common agreement.

» **Developing a structured and detailed definition of the rules of engagement.**

- + Many of the partners who participate on the wraparound community team may be used to participating in cross system, community or collaborative meetings, some of which may not have been designed to be as supportive of systems change as the wraparound community team. In order to avoid this just being “another collaborative,” it is useful to create detailed descriptions of the role and responsibility of each team member and the body as a whole.
- + Lead the group in identifying their decision making process before they make decisions. This can be formal or informal, involve voting, majority rule or a variety of other processes but it is often helpful for individuals to make a decision about decision making before confronting the gathered group with the decision itself.

» **Developing a process for managing changing representation of stakeholders over time.** The initial group gathered to support wraparound implementation will change over time based on community and personal conditions.



- + Remember to orient new members with the same care and attention you used with the initial group’s development. This includes creating a written “memory” as well as identifying “buddies” or “mentors” for new members. Doing an orientation individually or in small groups outside of the meeting time can help keep meetings focused and efficient for all members.

- + Acknowledge and reflect on changes from the initial development of this group. It is important for groups to recognize what

they do now and how it differs from their original activities. For example, one community team no longer reviews flex fund requests on an individual level. In the early years of implementation, reviewing individual flexible fund requests was helpful for identifying the types of gaps within systems as well as developing consensus about appropriate expenditure patterns. Over the years this community team discovered that continuing to review each request led to micro-management and, in some cases, detracted from the wraparound value of family voice and choice by having a group of strangers reviewing each expenditure. This group now reviews system patterns, including a quarterly aggregate financial report that shows cumulative expenditures for all enrolled families by life domain.

## 5. What are key community partnership cautions?

» **Getting too far ahead of your community partnership.** Wraparound projects that move forward with implementation on the ground with families without bringing along their collective community partnership will find their project at risk of becoming an isolated pilot that has little relevance to the larger system or community context. When this occurs, the wraparound project looks like a sub-

culture that partners tend to dismiss. This isn't good for families or staff. Involve your partners at every step of implementation even when you don't want to.



» **Failing to evolve within community partnerships.** Creating a capacity for community partnership is developmental. The composition, focus, activities and traditions of your community partnership will evolve over time. It should. As your wraparound project matures, so will the relationships that comprise your collaborative body.

» **Omitting key players.** Good collaborative bodies should include a range of representation. This means that the collaborative body should be prepared to invite, welcome and work closely with a range of individuals from a

range of backgrounds. Avoiding jargon, adapting approaches including meeting locations, times and formats and fostering alliances among members can contribute to the effectiveness of the partnership experience.

- » **Allowing dominating perspectives.** The collaborative body should avoid allowing a single person or organization to be the overpowering force behind the effort. While it is not unusual for one member to have a different investment in wrap-around implementation than another, it is important that the project be open to a wide range of perspectives. If one system or partner had all of the answers you wouldn't need wraparound.
- » **Accepting a false consensus.** Consensus doesn't necessarily mean that everyone agrees with every decision. Effective collaborative bodies are able to incorporate conflict in decision making, create space for disagreements to emerge and leave time to work through differences.

## 6. What is the “take-home” message?

Utilizing community partnership to guide and support your wraparound initiative is a critical and developmental component of effectively managing this kind of effort. Critical decisions include who participates, where you locate the partnership body, establishing appropriate decision making scope, and maintaining vitality and focus over time for the group that works together. Developmental aspects of this partnership will be reflected in refining and adapting the focus of the partnership as the community and system conditions change. What the partnership will need to work on in the third year of your project should be very different than what you need to do in the first year of the effort. This change will be reflected developmentally in the content and scope of the decisions that are considered and made, as well as the structures that represent your wraparound community partnership.

# Theme 2:

## Collaborative Action

**According to the Community Supports for Wraparound Inventory, when a wraparound initiative is fully supported in the area of collaborative action, *stakeholders involved in the wraparound effort take concrete steps to translate the wraparound philosophy into specific policies, practices and achievements.***

*Collaborative action* is tightly tied to *community partnership*. *Collaborative action* reinforces the idea that leadership has a role that goes far beyond making an initial decision to build wraparound capacity. For successful wraparound implementation to occur, policy makers, in collaboration with community and system partners as well as practitioners and families, must work together to take the steps that are needed to achieve the goals of the wraparound plan. Wraparound is unlikely to survive without a corresponding leader(s) or champion(s) providing support. Even as the project develops the capacity to support families using wraparound planning, collaborative action needs to occur concurrently on the program and system levels.

This section focuses on key issues and strategies to consider in helping your wrap-around stakeholders move ahead in a collaborative and coordinated way. For more details and community examples, you can also find several articles in the NWI's *Resource Guide to Wraparound* that provide information about the process of community development and system change that is typically necessary in order for communities to collaborate in their activities in support of wraparound, including "Planning for and Implementing System Change Using the Wraparound Process" (Chapter 5b), and "Family Voices Network of Erie County: One Community's Story of Implementing System Reform" (Chapter 5b.2).

## 1. What are some important first steps?

- » **Locate collaborative leaders for your wraparound efforts.** Wraparound efforts rarely succeed without champions. These champions can be housed in funding agencies, provider agencies and partner agencies. These leaders must have several key characteristics to be successful wraparound sponsors, including having a significant understanding of wraparound, clarity on what the initiative hopes to accomplish, and knowledge of typical methods used in wraparound to accomplish goals. Further, these collaborative leaders must be able to see the whole and component parts on both vertical and horizontal levels. This means that effective collaborative leaders can design policy initiatives that are coherent and add value to the wraparound initiative at the ground level where the process serves youths and families.
- » **Develop a guiding plan.** Managers and leaders associated with wraparound implementation should design and structure a plan that is future-oriented, concrete and specific. Collaborative action without that guiding plan runs the risk of detracting from the wraparound initiative rather than providing safe haven for it. Key decisions and issues that should be considered in creating the guiding plan include defining an initial population of focus; managing family entry and enrollment; funding and building capacity for necessary staff roles for wraparound implementation; developing supports and services as identified in wraparound team plans; setting performance measures including outcome, wraparound quality, satisfaction and fiscal indicators; and, finally, having a designated approach for mid-course correction.
- » **Focus on coordinated planning at all levels.** Leaders, including managers and supervisors, must work together to ensure that integration is occurring from the

child and family level through the agency level, and on through the policy level. This means that leaders must work to ensure that single plans are evident at all levels of the initiative. At the team planning level, this means that all parties agree to work off of a single plan of care. At the community level, this means that leaders should focus on coordinating and/or integrating administrative activities. Examples include creating consistent agency policies and procedures that are compatible with the wraparound initiative. This might include programmatic concerns (family as unit of support, working with entire families, partnering with parents and caregivers), personnel concerns (incorporating family voice in recruiting, hiring and evaluating staff) and administrative concerns (opening organizational culture to family impact).

## **2. Doesn't the necessary level of collaboration take time to build up?**

Yes! Working together to translate wraparound into concrete actions and to build coherence between the values espoused by wraparound and the way the system or “host environment” operates takes time, commitment and talent. Often, it takes some initial success to convince stakeholders to make a deeper commitment to collaboration and to wraparound, and this allows the project to move forward into more truly collaborative activities. Leaders need to be clear-sighted and, often, pragmatic when deciding what they can implement in the short run versus what is ideal for wraparound. They may decide that a less formal, less developed and less fully collaborative option is what is needed in order to get the wraparound project underway; however, leaders should be aware of challenges that may arise as a result.

For example, some projects choose to begin operation using facilitators that are loaned or bought out part-time from their usual jobs in child- and family-serving agencies such as mental health or juvenile justice. Thus, these facilitators are not employed exclusively in wraparound, and have not been hired specifically for the wraparound project. This sort of model may be the most feasible option for some communities in early-stage wraparound development; however, experience has shown that communities that rely on this sort of staffing plan have a hard time ensuring that these part-time facilitators have sufficient time, skill, and motivation to complete a high quality wraparound process. Demands from the “home” system may take precedence over wraparound duties, since the home system is the one that typically remains the official employer. Additionally, the project often experiences



confusion about who will supervise these part-time facilitators, and the facilitators themselves often complain that the philosophy and values that govern their other duties are inconsistent with wraparound's philosophy and values. This is not to say that this sort of staffing pattern never works out or allows a community to eventually move to a staffing pattern with full time facilitators hired specifically for wraparound; however, stakeholders should educate themselves about the challenges associated with such a choice. Of course, making too many compromises can mean that a community implements wraparound so poorly that it doesn't really help families and/or that various stakeholders become disillusioned and unwilling to collaborate with the wraparound project.

### 3. What are some of the most common pitfalls we should avoid?

- » **Failing to allow enough time.** Building collaborative action that creates support for wraparound implementation takes time and commitment. Managers and leaders must be prepared to stay connected with the project through its early implementation, and continue to stay involved as the project matures, expands and adapts. Be prepared to dedicate time to understand how the project is operating, as well as creating mechanisms to ensure that administrators have a significant understanding of the child and family's experience.
- » **Creating a firewall between the wraparound project and the rest of the system.** A wraparound project should be relevant to the overall system in which it operates. If not, the project runs the risk of becoming increasingly irrelevant over time. Wraparound principles should be relevant to the rest of the system and wraparound-compatible language can be reflected in contracts, agreements, procedures and policies. In some cases, wraparound managers will identify inconsistency between system processes and wraparound processes. In these cases,

managers and community teams should work to resolve those inconsistencies for direct service staff and families.

- » **Failing to become the change you wish to see.** A common mistake for many wraparound champions is to focus change efforts on the wraparound project rather than their own organizations. County mental health or child welfare managers who create wraparound contracts so they can have an additional referral option miss the boat when they don't make changes in their own operations. Likewise, the administrator of a nonprofit organization who thinks he or she can start a wraparound department without identifying procedure and protocol changes agency-wide is likely to be faced with many challenges and organizational conflicts shortly after implementation.
- » **Substituting values speak for real change.** Some leaders and wraparound champions are able to preach the need for change around wraparound values. The wraparound values base can be useful in terms of creating a case for change as well as way to talk about change. Realizing the potential of wraparound requires a change in systems and structures and wraparound champions should be



prepared to make these changes. During early days of implementation, this may involve seeking exceptions to situations but as the project matures wraparound leaders should be prepared to construct policy and procedural changes that show a formal endorsement for creative, needs-based planning and programming.

- » **Omitting young people and families.** Young people and families should be part of the collaborative action and leadership equation. When joining with young people and families there are two common traps that leaders may face. The first is the trap of guilt. This occurs when an in-system ally hears the family's perspective for the first time and begins to realize what brought them to this situation. This

can also occur when families raise concerns about wraparound implementation. Guilt can cause paralysis and shame. The second area is the trap of denial. This occurs when a family's perspective is heard but the reaction is to deny the reality. Often, families' messages about system operations seem too painful to contemplate. This sometimes occurs with nascent wraparound projects as families make complaints. Even though wraparound may reflect a community's best hopes for excellent practice, wraparound is as capable as any other approach of getting it wrong with an individual family. Don't let this possibility deter you from including youths and families in leadership and course correction, or from being persistent in your efforts to improve services and systems through wraparound when a family points out shortcomings.

#### **4. What is the “take home” message? What are the key things we should keep asking ourselves?**

Here are some key questions to help you remember some lessons learned by others as you move from building partnership to collaborative action on your journey:

- » Have we worked to ensure that all participants in our effort understand the values that guide us?
- » Have we invested the time to make sure we have a plan for moving ahead, and that the right people know the plan?
- » Have we created an environment where we are changing not only the space between agencies and organizations, but also paying attention to changing individual agency/ system life so that it aligns better with our vision and action plan?
- » Have we laid out a clear plan for our first and next steps?
- » Have we revisited and updated the plan as a way for us to model collaborative action at the planning and leadership table?

# Theme 3:

## Fiscal Policies And Sustainability

**According to the Community Supports for Wraparound Inventory, success in the area of fiscal policies and sustainability in wraparound is achieved when *the community has developed fiscal strategies to meet the needs of children participating in wraparound, and methods to collect and use data on expenditures for wraparound-eligible children.***

Successful wraparound projects require funding and fiscal policies that embrace wraparound values. A key question is whether you can do wraparound planning without funding. The answer to that is “it depends.” First, it depends on how much capacity you want to build. If you are looking to establish wraparound in your system as an exception to basic care and use it sparingly you can probably garner enough staff resources to follow the process, but it will probably be inconsistently achieved. Second, it depends on the current degree of flexibility of your system’s resources. If you are in a system that has maximized flexibility so that every dollar is seen as flexible and is able to follow the child and family, then you probably don’t need

additional funding to implement a high-quality wraparound process. If, however, you are looking to make wraparound regularly available within a typically siloed system, then you probably need to assign initial dollars while working to create more flexible fiscal policies over time.

This section addresses some of the most important questions that typically arise when communities are developing strategies related to fiscal policies and sustainability.

## 1. How have communities used available funding streams to finance and sustain wraparound?

The *Resource Guide to Wraparound* contains a number of chapters that focus on this important question. The chapters are found in section 5d of the *Resource Guide*, and include:

- » “Developing, Financing, and Sustaining Wraparound: Models for Implementation”
- » “Private Provider & Wraparound Flexibility”
- » “The Wraparound Orange County Model”
- » “Developing, Financing and Sustaining County-Driven Wraparound in Butler County, Ohio”
- » “Funding Wraparound is Much More than Money”
- » “EMQ Children & Family Services: Transformation from Residential Services to Wraparound”

## 2. What are some of the key wraparound capacities that we will need to fund?

There are a number of options that states can pursue to support and/or incentivize the development of local or county wraparound efforts. Regardless of whether the funding strategies are implemented at the state or local level, it is local leaders who are responsible for creating capacities that are necessary and desired in their wraparound project. This means that the local effort should be responsible for ensuring the following capacities are met:

- » **Funds are available for the cost of doing wraparound.** Certain func-



tions and responsibilities are implied in any wraparound project. These functions include facilitation of teams, meetings and plans; care coordination including organizing, arranging and modifying services, supports and interventions; and infrastructure necessary for managing and supervising wraparound. Most projects also include provision of peer-to-peer support to families as a key capacity for wraparound implementation. These key capacities are generally budgeted in the personnel line associated with a wrap-around project and may take the form of FTEs in each of the named areas. Communities vary in terms of how the staff roles are structured and arranged but a local

contract manager or program developer should ensure that there are sufficient fiscal resources for staffing roles so that that key wraparound tasks can get done efficiently and effectively.

- » **Funds are accessible for needed supports and services.** Contract managers should recognize that wraparound is not a treatment or specific type of program. The wraparound process cannot stand alone like other programs and services that may be funded. As a planning process, wraparound seeks to coordinate and integrate a range of services and supports. This means that contract managers should think through how to ensure that funding is available to pay for services, interventions, and supports that are needed to fulfill wraparound plans, including supports that are not reimbursable via traditional systems.
- » **Funds are flexible enough to implement the strategies that teams choose for wraparound plans.** A key ingredient of wraparound projects is the presence of funds that can be used to support and purchase a range of options for and with the family. Some communities manage this by creating a line item within a contract that is designated as a flexible fund category. Others will find a way to braid service dollars that are not necessarily flexible to pay for the services and supports that are needed. This sort of approach is used by Wraparound Milwaukee,

which functions as the care management entity for children in the mental health system in Milwaukee, Wisconsin. In Wraparound Milwaukee, Wraparound teams identify necessary services and supports. Results from those team meetings are identified in the management information system that allows individual providers to be paid by central administration. A range of existing funding streams have been pooled, allowing the project to match a funding source with the planned expenditure. In addition, the capacity to pay for services or interventions exists by always having an “other” category.

### 3. How do we know when to use flexible funds?

Wraparound managers are often faced with issues pertaining to adequate and appropriate management of flexible funds. In the early stages of wraparound implementation, it is not unusual for flexible funds expenditures to be considered frivolous, and this can lead to a period of tightening down on flexible fund policies. Wraparound managers will do well to establish a clear logic for expending flexible funds. One example of such logic is listed below:

Does the intervention, planned interaction or expenditure...

- » **...Build on family strengths?** It’s helpful to check to make sure that the strengths are functional and real and were identified prior to the decision to pursue the service/support that requires funds, rather than having strengths filled in to justify a service, support, or intervention.
- » **..Add value to the stated mission?** Does the intervention or planned action seem as if it will get the team and plan closer to the mission or outcome that is being pursued? This would presuppose that the team has developed a mission statement. The mission should be compatible with the conditions that brought the family to the attention of the system in the first place.
- » **...Meet identified child and family needs?** Does the intervention directly address a need that has been stated as unmet and targeted by the team? The team should be able to identify the action and state how it will address identified needs.
- » **...Represent a culturally competent direction?** Does the planned action or

intervention fit well with the family? The action should be relevant to family members' sense of their own identity and should fit with how they experience their own community. Characteristics to consider include ethnicity, class, age, location, spirituality, nationality and traditions, among others. Interventions should be chosen which are compatible with the family's self-definition.

- » **...Build on community capacities?** Does the intervention empower the community and those in it to care for and support the child and family? For example, has the caseworker ensured that a landlord is given a chance to help out rather than first requesting flexible funds to cover a family's housing-related costs? Projects should check to make sure that system resources in terms of people, money and expertise are being used to create community caring.
- » **...Represent a good deal for the investment?** The planned action should be reviewed to ensure that it represents a good deal for the price. This is true for flexible fund expenditures, staff investment of time, referrals to categorical services and any other endeavor that a staff member could undertake. When pursuing the right price, the results of the investment should also be considered so that the bid that wins out won't always be the lowest one, but rather the one that yields the best outcome for the investment.

#### 4. What are some of the most common fiscal cautions and pitfalls?

- » **Over-relying on any one funding stream.** Administrators must recognize that wraparound is a planning and organizing process that seeks to incorporate, integrate and create a range of supports in order to meet a family's needs. Since wraparound is an integrative model it stands to reason it requires an integrated funding stream. The question for funders is how much integration they need in order to construct a coherent funding platform. Integrating Medicaid funding to pay for medically necessary services and supports through a wraparound planning process while using general fund services to pay for all or a portion of staff time may be enough integration. Other sites may pool a wider range of funding streams. Successful wraparound projects find a way to harness multiple funding streams to pay for services and project operation.
- » **Falling into the Medicaid trap.** Medicaid is frequently used within wraparound projects. Some functions within the wraparound process itself may indeed be

billable to Medicaid. Others are close but require staff and administrative time to make them fit. Still other wraparound functions don't line up with Medicaid rules and regulations. Billing Medicaid may seem like a good idea but good managers should identify whether the cost of making the proposed intervention fit within billing definitions outweighs the potential revenue. Likewise, funders should create opportunities for some staff time to be billed to other revenue sources so that the support activities of wraparound can be integrated with the clinical activities. Maintaining the right balance between support and clinical intervention will ensure that the wraparound project functions effectively.



» **Over-managing flexible funds.**

Heightened sensitivity to public perception causes some sites to create so many rules and requirements that flexible funds fail to be used flexibly. This can often build resentment on the part of staff and families, who feel like rules are applied arbitrarily. Rules are fine but you should consider how rules can reinforce wraparound practice and principles.

» **Under-managing flexible funds.**

Some sites will under-manage flexible funds by providing no guidelines for their use. When this happens, family access to flexible funds may be random and projects face the risk of running out of the resource. When this happens, flexible funds no

longer function as a tool but instead become a barrier that keeps families and those hired to help from having candid, honest conversations.

- » **Stopping at flexible funds rather than building flexibility in funding.** Flexible fund pools can be a powerful tool in wraparound. These pools are usually somewhat limited when compared to sources of inflexible funding. Wraparound is as much a system change strategy as a process for supporting children and families. Ultimately, wraparound projects should work towards building as much flexibility in funding throughout the system as possible. This means that projects

will have to rely less on the wraparound flexible fund pool as the system adapts and becomes more flexible.

## 5. What are some fiscal options for state leaders?

Local wraparound initiatives are correct in recognizing that state-level fiscal policies and supports are often critical to ensuring local wraparound sustainability and success. In many states, state-level leaders have spurred the development of community capacity for wraparound by developing fiscal incentives for implementation. Examples of these incentives include:

- » **Redirecting existing funds.** One option available on a state level is to create new opportunities for local communities to support wraparound by using existing funds from existing funding streams. For example, some states have chosen to create avenues for local jurisdictions to spend what would have been spent on residential care on wraparound infrastructure instead. This typically involves one of two scenarios: (1) redirecting the state and county share of the residential budget, or (2) pursuing some sort of federal waiver that allows for spending certain federal funding sources more flexibly.
- » **Making grants.** Some state leaders will provide grant funds to local jurisdictions and providers to build a core wraparound capacity. In some cases, this grant making will involve funding the entire project including staff costs, program costs, and projected service costs and often, flexible funds costs.
- » **Building incentives.** Many state leaders find they don't have the funds for fully building wraparound capacity, and they also correctly worry that using grants to promote wraparound development may undermine the sustainability of the projects that are created with temporary funding. As a result, some states have used an approach in which they provide incentives to local jurisdictions to begin to build wraparound capacity. This frequently involves hiring some initial staff, such as a local project coordinator or wraparound facilitators, or creating some seed funds for the development of a flexible fund pool that can be used to secure other local commitments.

The following table provides more details on the advantages and disadvantages of each of the above state-level options for funding local wraparound initiatives.

**Options for Funding Wraparound Capacity:  
Strategies for State Leadership**

Option	Description	Advantages	Disadvantages
Redirecting Existing Funding	In this option, existing funding streams are redirected to creating wraparound capacity in local communities. This might require a legislative change that allows certain budgetary lines to be redirected (as in the case of HB 1741 or SB 163 in California) or creates redirection through administrative rule changes.	<ul style="list-style-type: none"> <li>» Local jurisdictions make a choice to stop something in order to build something else; clarifies wrap-around as more than just an option</li> <li>» Assures sustainable funding streams by redirecting existing resources rather than creating new resources</li> </ul>	<ul style="list-style-type: none"> <li>» Often requires formal action such as legislative or formal rule change</li> <li>» Can take more time</li> <li>» Some communities may not come on board as they can't imagine losing some existing capacity to build this new capacity</li> </ul>

*(table continued on next page)*

**Options for Funding Wraparound Capacity:  
Strategies for State Leadership (continued)**

Option	Description	Advantages	Disadvantages
Making Grants	This typically involves providing funding for the entire wrap-around operation, including personnel, programmatic and individual family costs.	<ul style="list-style-type: none"> <li>» Full-service funding can allow projects to begin without having to scrimp, save and cut corners</li> <li>» Reluctant or slow implementers may jump on board faster because of the presence of full funding from grant sources</li> </ul>	<ul style="list-style-type: none"> <li>» May be difficult to keep program going after the grant funding expires</li> <li>» Reduces incentives for local agencies and partners to work together to build local capacity, because funds are provided from an external source</li> <li>» Local project may not feel “ownership” – rather, it is owned by the funding source</li> </ul>

*(table continued on next page)*

**Options for Funding Wraparound Capacity:  
Strategies for State Leadership (continued)**

Option	Description	Advantages	Disadvantages
Building Incentives	This strategy involves the state developing some sort of incentive to subsidize wraparound project development. This limited funding is typically designed to assist with initial outlay of development costs including personnel or flexible funding costs. (Examples of this model can be found in states such as Michigan and Wisconsin, with their early efforts to create capacity for flexible, collaborative, community based programming.)	<ul style="list-style-type: none"> <li>» Creates seed money so local jurisdictions can get started</li> <li>» Allows states to monitor development closely to ensure the wrap-around project is compatible with customary wrap-around expectations</li> <li>» Can stimulate cross-site development by bringing seed projects together from time to time</li> </ul>	<ul style="list-style-type: none"> <li>» May not fully address the issue of how to build adequate capacity for full wraparound implementation</li> <li>» Providing circumscribed and limited incentives may cause the project to “get lost in the shuffle” of other funding streams and projects, restricting momentum toward fully supported wraparound</li> </ul>

## 6. What are some examples of state action to facilitate wraparound funding?

Some examples of state legislation and other state supports to wraparound in the above areas are provided below.

### **Redirecting existing funding.**

- » In 1997, wraparound was established in California under Senate Bill (SB) 163 (Chapter 795, Statutes of 1997) which allows California counties to develop the Wraparound Model using State and county Aid to Families with Dependent Children – Foster Care (AFDC-FC) dollars. This legislation permits counties to use the wraparound funding for planning and services delivery instead of use for placements of children/youth in high-end group homes (Rate Classification Level (RCL) 12-14.) For a summary of SB 163, and a link to the bill itself, see [www.dss.cahwnet.gov/cfsweb/PG1320.htm](http://www.dss.cahwnet.gov/cfsweb/PG1320.htm).

### **Making grants.**

- » In 2007, the Washington Legislature passed Second Substitute HB 1088, which declared an intent to substantially improve the delivery of children’s mental health services in Washington state, established an Evidence-Based Practices Institute, and provided that educational service district boards may respond to a request for proposal for operation of a wraparound model site under this act and, if selected, may contract for the provision of services to coordinate care and facilitate the delivery of services and other supports under a wraparound model. To view a summary of HB 1088 with links to the bill itself, see <http://apps.leg.wa.gov/billinfo/summary.aspx?year=2007&bill=1088>.
- » In Massachusetts, The *Children’s Behavioral Health Initiative* (CBHI) is an inter-agency initiative of the Commonwealth’s Executive Office of Health and Human Services, whose mission is to strengthen, expand and integrate Massachusetts state services into a comprehensive, community-based system of care, and to ensure that families and their children with significant behavioral, emotional and mental health needs obtain the services necessary for success in home, school and community. The CBHI provides funds to over 30 local Community Service Agencies to implement core elements of the Initiative, including the wraparound process.

## **Building incentives.**

- » In Michigan, the Division of Community Services in the Department of Human Services is involved with the statewide development and implementation of the wraparound process for children and families at risk of placement. For a summary of the methods through which the state provides support to local implementation, see [www.mi.gov/dhs/o,1607,7-124-5452\\_7124\\_7210-15379--,00.html](http://www.mi.gov/dhs/o,1607,7-124-5452_7124_7210-15379--,00.html).

More complete examples of state fiscal models for sustaining wraparound implementation can be found on the NWI website at [www.nwi.pdx.edu/financesustainability-additional.shtml](http://www.nwi.pdx.edu/financesustainability-additional.shtml).

## **7. What is the “take-home” message?**

Funding and fiscal policies have to be addressed if wraparound is to be sustained on a significant scale in your community. In addition to providing funding and ensuring flexibility, wraparound projects need to have access to information about how much is being spent, on what services/supports, and for whom. Only this kind of information can truly inform you about key facets of your implementation, including what is working (what’s not) and how it is working (how it isn’t). Effective and hands-on management of fiscal resources will help you create the needed match between family needs and services, supports and activities.

# Theme 4:

## Access To Needed Supports And Services

**According to the Community Supports for Wraparound Inventory, when a wraparound initiative is fully supported in the area of access to needed services and supports, *the community has developed mechanisms for ensuring access to the wraparound process and the services and supports that wraparound teams need to fully implement their plans.***

This section provides an outline of key considerations, pitfalls, and strategies related to developing and managing the services and supports that wrap-around teams will need for the plans they create.

### **1. What sorts of services and supports will our families need?**

As you roll out your initial wraparound effort, it is important to remember that it is based on a set of principles that are different than those that underlie many programs or projects. Wraparound is a planning process that is used to coordinate, create, tailor, and individualize services and supports to fit the unique needs of the child and family while also building on

their strengths. While many other programs are predicated on a defined program model, wraparound is built on the notion of individualization. In other models, managers and funders may focus on uniformity in an attempt to ensure that families have access to the program as it is designed. In wraparound, the organizing process should occur with consistency but the plans that are produced should vary considerably from family to family. This means that the system in which the wraparound initiative is functioning must have a wide array of services and supports available, and that managers attached to wraparound projects should be prepared to manage for creativity, flexibility and originality.

Wraparound is best implemented in the context of a *community based system of care*. This means that those involved must be able to see the entire community as a resource that can be deployed for families. Wraparound projects are also predicated on the notion that *help is more than services*. This means that leaders of the wraparound effort need to ensure that a wide array of supports and interventions are considered and developed in building wraparound capacity. Wraparound projects should include a blend of services and supports including:

- » Formal services drawn from the existing system, including evidence-based treatments that have been shown to be effective in achieving outcomes and/or meeting emotional and behavioral needs;
- » Creative interventions that are developed on a one-youth/family-at-a-time basis; and
- » Purposeful support designed to help families get through system processes.

## 2. What are some key issues that communities need to consider as they work to ensure access to needed services and supports?

- » **Creativity.** Managers, including providers involved in overseeing wraparound, should be prepared to create structures that lend themselves to creativity. This might occur through the strategic use of flexible funds, deploying flexible staff resources or working out unique arrangements with other providers from within the system or community. Additionally, managers should be prepared to develop creative arrangements with system monitors, such as licensing authorities, to ensure as much flexibility within program structures as possible. Managers should be prepared to partner with practitioners to ensure that the wraparound

program has an ongoing capacity for service creation for each child/youth and family at a time. This ability to individualize through service creation requires ongoing support from management either through creative arrangements with other organizations, flexible contracting, or the capacity to reassign staff roles to meet the needs of families.

- » **Wide range of options.** Not all services or supports identified in a wraparound plan will need to be created. Some will be existing services and supports, while some will closely resemble usual and customary services, though perhaps with some minor readjusting. What is important is that the wraparound project creates alliances that allow the widest range of services possible for families. Wraparound projects should avoid assuming that certain services will be limited or not needed. In fact, when it works best, wraparound serves to blend and integrate a range of services from traditional to nontraditional, from tried and true to never before attempted. Good wraparound leadership creates a platform to arrange all of the possible services and interventions on behalf of children and families enrolled in the project.
- » **Ensure open doors.** A key feature of necessary services and supports is that families are able to get to the right services when necessary and aren't burdened with services that are not needed. Access often means that services can be tailored in terms of time and location, depending on the needs of the family. Wraparound staff should be expected to participate in creative resource development. On the other hand, wraparound managers should monitor creative resource development to ensure that families are getting what they need with the right amount of effort.

Ensuring access frequently plays out in two ways at the team level. The first is the team working with the family in exercising choice about the provider of services. Families and teams should be able to leave service providers who are not working out and gain access to alternative providers. The second way is ensuring access during crisis periods. This access typically focuses on three features including developing an individualized on-call capacity, having the ability to respond wherever the crisis is occurring, and the capacity to link to other resources even during after-hours periods.

- » **Focus on just-in-time help.** Pace and urgency are critical concepts within the wraparound process. While working with children, there is not a lot of time to



make mistakes as the clock is ticking on the young person's childhood. Wraparound leadership has to be prepared to construct a range of "just-in-time" resources designed to assist families enrolled in the project. Expediting waiting lists, creating short term fill-in capacity, and realigning resources to fit with demand are all activities that fit with the notion of timeliness. Another concept attached to timeliness within wraparound centers around the capacity to shut off interventions as needed. Wraparound is designed to customize service responses according to unique individual needs. This means that when a service is no longer needed it can be shut off, even if that shut-off will be temporary. This differentiates wraparound from many other programs in which young people stay

enrolled until a natural calendar break or until the anticipated discharge from service nears. Being able to shut off services that are providing less potent results is as important as granting access to a range of needed supports and services.

### 3. What are some strategies that have worked for creating and managing an appropriate range of services and supports?

Wraparound is not a standalone process. Effective project implementation requires that a range of services, supports and strategies be available between meetings. Leaders involved in implementing wraparound must consider ways to ensure that those responsible for implementing the wraparound planning process have a range of interventions that can be deployed through the planning process. Strategies that have been used in a variety of settings include:

- » **Creating a service provider network.** This option entails creating and organizing a range of service providers that is available to individual wraparound teams. This typically involves estimating a range of services that might be necessary and creating a structure for easy access by individual teams. Driven by contracts

or memoranda of agreement, services are not accessed until needed, thereby starting with the family rather than the program. Typical provider networks don't guarantee a minimum amount of utilization but instead let the demands of individual wraparound teams drive the response. This approach works well when there is a centralized funding pool to pull from or when the funds available for wraparound implementation are large enough to warrant a structure for purchase of services. The advantages of this strategy include fostering a wide range of partnerships in wraparound rather than focusing on a single wraparound organization, and developing a knowledge base about family needs and service utilization. Good provider networks bridge community and system concerns. Balanced provider networks will include a range of providers from certified mental health professionals to neighborhood or community organizations or associations that can be connected to help out. Finally, effective provider networks have the capacity to certify and enroll individuals or organizations to provide services or supports for a single child or family involved in the process.

- » **Managing a resource directory.** Some sites find that they don't have the political or fiscal will to develop and manage a provider network. These sites find the less formal approach of creating a resource directory to be an effective alternative. This approach creates associations and agreements among a range of providers to work together to build flexible responses. Families can even rate their experiences with certain providers, which can be reviewed by teams as they develop the services and strategies for their plan. This approach works well for many things including crafting services and strategies that are tailored to individual situations. It is often more difficult, however, to get to individualized responses with this informal approach due to system barriers, contract limitations or rules and regulations.
- » **Contracting for flexibility.** Another approach involves constructing flexible contracts. This entails developing or funding a certain amount of flexibility in the basic wraparound project design. Examples include providing funding for a range of flexible staff that can provide immediate and creative responses to families, or providing significant amounts of flexible funds for use in purchase or arrangement of flexible services and supports. One way of achieving this is by funding well-designed direct support services. More information about this approach can be found in the *Resource Guide to Wraparound* chapter entitled "Direct Support Services in Wraparound" (Chapter 4d.1).

#### 4. What are some of the most common service array cautions and pitfalls?

- » **Focusing solely on access and neglecting exit.** Many wraparound projects focus on making sure services are available but fail to create protocols for families to cease services they don't find helpful.
- » **Over-focusing on a particular type of service or support.** Effective wrap-around projects ensure a balance between clinical intervention and community support. Some projects become so focused on clinical interventions that they neglect community participation and basic support while other projects will focus on basic support to the exclusion of clinical intervention. Leadership should plan and monitor for a balance between these two extremes to ensure that families don't have to sacrifice one or the other in order to participate in the process.



- » **Failing to individualize.** Individualization means that services, supports and strategies can be constructed or created based on individual family needs. In addition to flexible timing and location of delivery, highly individualized responses can include the capacity to imagine and create a one-family-at-a-time service that has never been tried before. Some wrap-around projects are designed so that while facilitation is funded by the project, it is assumed that all services and supports will be paid for from existing funding streams. This will often lead to frustration with the lack of flexibility in programming that many of these funding streams represent, and to a lack of individualization, which

negates the point of the wraparound process. Effective leadership should anticipate this and create formal protocols to allow for one-time exceptions to policy in order to ensure that responses are individualized.

- » **Focusing on crisis planning rather than crisis doing.** While the wraparound process identifies clear steps for developing a crisis plan, it is important that the

project creates the capacity for immediate crisis response. This means that families enrolled in wraparound should not have to manage the crisis on their own and that wraparound has ensured that a tailored and preferably individualized response is available when needed. Effective crisis programming in wraparound should include after-hours coverage, up-front stabilization to help families feel supported and comfortable enough to effectively engage in wraparound, and mobile response so that crisis coverage goes to where the family is rather than forcing the family to come to the project.

## 5. What's the take-home message here?

Creating and ensuring access to a variety of “individualizable” services and supports requires as much effort as creating a sound capacity to facilitate wraparound planning. Many communities will focus on the planning process, and overlook the fact that interventions that occur between team meetings are critical. Ensuring a range of responses that are individualized, tailored, and flexible in terms of location and timing should be considered early on in wraparound implementation.

# Theme 5:

## Human Resource Development & Support

**According to the Community Supports for Wraparound Inventory, human resource development and support in wraparound is achieved when *the policy and funding context supports wraparound staff and partner agency staff to work in a manner that allows full implementation of the wraparound model.***

Wraparound projects require a thoughtful and deliberate approach to building staff and personnel capacity. Effective human resource development requires both organizational alignment and individual accountability to ensure effective operations. This section provides information on how stakeholders involved in the wraparound effort can achieve such alignment and effective operations.

### **1. What represents adequate staffing in a wraparound project?**

The first concern that leadership in a wraparound project should consider is the allocation of staff resources. Certain functions must be carried

out within wraparound and it is important that the administrator develop job

descriptions and program plans that reflect these key functions. Some of the more common functions for which human resource capacity must be developed are listed below. For each of these staff roles, links to relevant chapters in the *Resource Guide to Wraparound* are provided.

» **Wraparound facilitator or care coordinator**

- + See “Phases and Activities of the Wraparound Process: Building Agreement About a Practice Model” (Chapter 4a.1) and
- + “The Phases of Wraparound: Real Life & Teams” (Chapter 4a.2)

» **Wraparound family support partner**

- + See “Application of the Ten Principles of the Wraparound Process to the Role of Family Support Partners on Wraparound Teams” (Chapter 4b.1) and
- + “How Family Partners Contribute to the Phases and Activities in the Wraparound Process” (Chapter 4b.2) and
- + “Family Partners and the Wraparound Process” (Chapter 4b.3)

» **Youth advocates**

- + See “Youth Engagement, Empowerment, and Participation in Wraparound” (Chapter 4c.1) and
- + “Youth Advocates: What They Do and Why Your Wraparound Program Should Hire One” (Chapter 4c.2) and
- + “Youth Participation in Wraparound Team Planning: Why and How” (Chapter 4c.3)

» **Direct support services**

- + See “Direct Support Services in Wraparound” (Chapter 4d.1)

» **Wraparound clinicians**

- + See “The Role of the Clinician Employed in a Wraparound Program” (Chapter 4d.2)

» **Wraparound supervisors**

- + See “Wraparound Supervision and Management” (Chapter 5c.6) and
- + “Supporting Workforce Development: Lessons Learned from Wraparound Milwaukee” (Chapter 5c.4)

## 2. What are key areas to consider in building human resource development and support?

- » **Adequate support to staff.** Once key functions have been outlined, project leaders should predict the necessary staff time to ensure that these key functions are provided with enough resources. This means that staff must be afforded enough time for task completion and case load sizes must be appropriate to the job expectations. *Simply adding wraparound duties to an existing job description or staff role is not sufficient.* One strategy for ensuring adequate staffing patterns



is workload management, in which supervisors monitor and attend to workload issues to ensure adequate time for key functions. Another strategy is resource development, in which managers ensure that staff have easy access to necessary tools and processes to meet the needs of families in a timely fashion. Another way to increase staff persons’ capacity to get the work done is to ensure that organizational artifacts (job descriptions, hiring processes and program statements) reflect a commitment to wraparound principles and practices. Finally, compensation to staff in key wraparound roles (e.g., facilitators and family partners) must reflect their value and encourage staff retention and commitment.

- » **A comprehensive performance system.** Training and supervision should be based on clearly defined expectations and focused on performance as it relates to these expectations. Training and supervision should be supported by objective data gathered routinely throughout wraparound implementation. This information should also be used in professional development efforts that include

individual training plans. The project should avoid sending people to training as a reaction to employee situations, and instead develop a comprehensive and deliberate training strategy with each employee. This deliberate training strategy should be focused on the goal of creating a competent work force that not only knows what to do and how to do it, but also can articulate why certain tasks in wraparound should be completed. Though understanding the basic procedures of wraparound is important, especially for new staff, adopting a “know why” approach creates a workforce that can individualize the wraparound process to fit with each family rather than simply focusing on the steps of wraparound. “Know-why” wraparound practitioners come to understand that the family is always more important than the practice model.

- » **Family involvement.** Young people and families should be incorporated in human resource development strategies. This is done by ensuring that families are incorporated in all phases of hiring, training, and supervising for effectiveness. Examples might include families sitting in on hiring interviews, families being surveyed regularly to solicit their feedback on employee performance, employing young people and families as core trainers for newly hired staff, and creating a youth/family-led staff recognition committee that identifies staff for exemplary practice.

### 3. What are some of the key human resource development cautions and pitfalls?

Human resource development and support in wraparound is not an easy task. Professionally trained staff often must take some time unlearning one set of concepts in order to relearn some other wraparound principles. Many projects will hire family members with direct system experience to increase the capacity of the project to connect with families being served. This may result in a wide range of expectations, skills and perspectives among staff members requiring wraparound leadership to actively manage conflict. While this can be managed on an ad hoc basis during early wraparound implementation, leaders should plan for and anticipate the following challenges as they implement wraparound:

- » **Providing unstructured supervision.** Reactive supervision (e.g., the “crisis of the week” approach) done in a vacuum with little or no data (e.g., about staff persons’ overall performance, youth and families’ strengths and needs, and/or wraparound plan development and implementation) often results in reactive

wraparound responses. This can then lead to staff confusion as they begin reacting rather than planning and organizing with families.



» **Promoting good practitioners without supporting them to become good supervisors.** Frequently, projects will promote good practitioners without helping them learn how to supervise. Facilitating a wraparound process is different than supervising people paid to work with families. Projects should be prepared to articulate their supervisory theory and ensure that newly appointed supervisors get an opportunity to learn management skills.

» **Establishing the supervisor as expert practitioner.** A supervisor that tends to focus on too much detail will often function as an expert practitioner who makes decisions about real families

during private consultations with their staff. While that supervisor may be quite skilled, it is unfair to both families and staff for the supervisor to function in this way. Families won't have the benefit of being able to speak directly to the person who is making the decisions, and must rely on the staff person as an intermediary. Staff in this situation may have difficulty learning new skills since the project functions by having staff come to the supervisor who is seen as the expert who answers questions and solves problems for staff.

- » **Getting stuck in the detail trap.** The more that is written about wraparound, the more detail is recorded. The power of wraparound is not in its discrete steps but instead it is the connection between the steps of phases that makes the difference. As a result, supervisors should be concerned that they do not overly focus on component steps, but rather on the deeper ideas of wraparound, such as always maintaining a strengths perspective, basing plans on family needs, and providing organized and holistic support to the family. The supervisor should be focused on the coherent whole and making sure the ideas behind wraparound are

carried out rather than focusing on any one technique.

- » **Failing to separate values from skills.** Employees who are able to articulate the wraparound values are not necessarily skilled at delivering wraparound. Supervisors should be able to articulate a minimal skill set that defines and describes behaviors. Next, supervisors should set up systems that allow them to monitor whether those behaviors are being deployed regularly within the wraparound project. In some situations with some families, wraparound staff will need to follow an unexpected course. In such situations, performance monitoring systems should allow staff to demonstrate skills while also adapting their skills to the needs of each individual family. As described above, good wraparound projects create the ability for staff to operate reliably rather than seeking uniformity of staff practice.

#### 4. What is the “take-home” message?

Human resource needs will change over time as a wraparound project grows. Initial work in this area involves anticipating necessary programmatic functions, aligning staff roles to ensure delivery of those functions, creating structures that allow those functions to be delivered with high quality and maximum efficiency, and establishing performance baselines to guide expectations and supervision. Over time, such data can support adjustments in staffing patterns, staff assignments, and methods of training and supervision that are employed in order to continually improve wraparound program operations, and the support that is provided to youth and families.

# Theme 6: Accountability

**According to the Community Supports for Wraparound Inventory, when a wraparound initiative is fully supported in the area of accountability, *the community has implemented mechanisms to monitor wraparound fidelity, service quality, and outcomes, and to assess the quality and development of the overall wraparound effort.***

This section provides information regarding how stakeholders involved in the wraparound effort take concrete steps to implement mechanisms to monitor wraparound fidelity, service quality, and outcomes, and to assess the quality and development of the overall wraparound effort. More detail on the topics presented here can be found online in the *Resource Guide to Wraparound*, in the chapters in section 5e.

## **1. What are the key issues to consider in building accountability for our wraparound project?**

Communities implement wraparound for a variety of different reasons. One community may be concerned about



spending patterns and perceptions of little or no outcome for monetary investment. A second community may be more focused on how the service providers meet—or fail to meet—children’s and families’ needs. Rather than just appropriating metrics that have been used by other projects, or picking evaluation instruments “off the shelf,” true accountability in wraparound requires asking what the goals of the project are and how it will be known those goals have been achieved, and then creating measurement strategies accordingly. To achieve this kind of accountability, it is important to start early on in the process of implementation, with wraparound stakeholders working together to establish indicators of success and failure. Areas to consider in building accountability include:

- » **Establishing clear outcomes.** *This area answers the question of whether you are getting the right results for your effort.* Stakeholders in the wraparound initiative should have an opportunity to collectively establish what outcomes are most important to them. If you don’t know the desired result then you run the risk of practicing for process’ sake rather than practicing with a purpose to get a desired outcome. You also won’t be able to answer questions about whether your effort has succeeded.
- » **Setting defining process elements.** *This area answers the question of whether you are following the right implementation procedures in your wraparound project.* Similar to establishing outcomes, a challenge for any new project is identifying what key process elements must be reliably achieved for participating youth/families. This means that your wraparound project has to first decide what practices you want staff and managers to follow and then monitor to make sure those practices are followed. There is no single best way to measure the process of wraparound implementation. Some sites will use research tools such as the Wraparound Fidelity Assessment System (WFAS) to get information about whether the activities and principles of wraparound are being followed. As an

alternative—or in addition—to WFAS or other research tools, sites may use supervisory and program checklists that identify how the process is being implemented at the youth and family level.

- » **Gathering satisfaction and other data directly from youths and families.** *This area answers the question of whether individual youth and families are satisfied with your implementation of wraparound.* Simply following the process or steps of wraparound implementation does not guarantee that youth and families will be satisfied with the process or that they will be getting their needs met. This area of building accountability requires direct feedback from youth and families who are most affected by the project. Such information may focus on their satisfaction with the wraparound process, satisfaction with services that are being received, and perceptions of whether needs are being met, whether progress is being made, and what barriers are getting in the way. Such information can be gathered through written surveys or direct interviews and should occur regularly from the onset of the project. Some sites will contract with family organizations or train family members to gather this information.
- » **Monitoring costs.** *This area answers the question of whether your investment of time, money, personnel, space and other resources is worth it.* There is no national standard for pricing wraparound; wide regional variances exist throughout the country. Costs related to wraparound include care coordination costs associated with arranging and organizing the process, and costs associated with the necessary services, supports and strategies that are outlined in a wraparound plan of care.

The four dimensions above come together to answer a complex question: Are you realizing the *right results* for doing the *right things* because you've made the *right investments* that satisfy the young people and families you are serving and *successfully meet their needs*? At the same time, there are complex issues that may facilitate or hinder success and that are difficult to measure with a simple evaluation tool. For example, the host environment in which your project operates is vitally important to the success of wraparound. Organizational coherence can have a positive impact on staff morale and project costs as well as family outcome. If you are not realizing the types of results you were hoping for within each of these areas, you may find that the issue is lack of coherence with the host environment. This means that wraparound is not likely to thrive in an organization or system that doesn't align

with wraparound principles. In addition to the above issues, it is important to be aware of the degree to which there is a fit between the organization, the system, and the goals and principles of the wraparound project.

## 2. What are the implementation steps we should undertake to build accountability?

Before making decisions about specific instruments or measurement strategies, building accountability for a wraparound initiative requires adherence to several core considerations.

- » **Determine how you will use your information before you begin to collect it.** The point of data collection is not just to collect data but to actually use it. It often helps to come up with a simple answer to the key question, “What information do we need and how will we use it or gain from it?” Once that is established you can then identify what information you need that will get you where you need to go, and what the best source(s) of data will be.
- » **Be critical in your methods.** Some projects will collect information because it’s convenient rather than collecting data that can stand up to scrutiny. Examples of this include surveying only those individuals who are easily reached, forming conclusions based on low response rates, or using methods to collect information that would lead one to question validity, such as relying solely on the provider of a service for data collection (some could argue this approach would result in a biased response).
- » **Set reasonable goals for data collection.** Wraparound projects should be disciplined in terms of establishing what they want to measure and then ensuring that adequate resources are dedicated to reliable and valid data collection, aggregation, and reporting. Projects should be disciplined about gathering only information they need to know and avoid drifting to things they might like to know, especially if it is not a clear need as identified by project stakeholders.
- » **Stay on the collaborative course.** In building a set of data measures it is important to continue to include other stakeholders and perspectives, including youth and families. Different people can get focused on single indicators that they take as a placeholder for quality or success. Reaching consensus about definitions of quality and success – and revisiting these definitions regularly – is one strategy for ensuring that key wraparound sponsors have a shared vision of quality and

success. It can also help these stakeholders stay together throughout implementation.

- » **Focus on the meaning of the process, not just the steps of the process.** As more is written and studied about wraparound, more detail emerges. This detail can lead to a reductionist course in which lots of discrete steps are evaluated but the overall purpose or goal of wraparound is lost. A focus on individual steps poses its own set of problems. Even though you can technically deliver each of the steps, this does not necessarily mean that you are providing quality wraparound. Like ballroom dancers, wraparound staff persons need to be able to put the steps together in a fluid pattern that communicates care, concern and compassion for and on behalf of a family. Additionally, measuring more steps adds complexity, and means having to focus on deciding which step(s) is/are most important. Though measuring process is important, remember to not lose focus on the meaning of the wraparound process and the overall goals of your project.

### 3. What types of data do we gather to assess whether or not we are doing high quality wraparound?

As described above, measuring the process of wraparound implementation can take many forms. Data collection and feedback can be critical in the process of supervising and coaching staff, as described in a chapter in the *Resource Guide to Wraparound* on “Wraparound Supervision and Management” (Chapter 5c.6). Others may focus more on using wraparound fidelity evaluation tools, which can be used in supervising wraparound staff, but are more frequently used in aggregate form to provide feedback to the site and its stakeholders about how implementation is going overall. Wraparound projects need to make these decisions for themselves. In general, however, measures of the process of wraparound tend to provide:

- » **Data on the quality of the wraparound process provided, collected by live observation, plan review, and feedback from youth and families.** The methods used to assess the process and its quality should be grounded in the principles of wraparound and used as the basis for ongoing quality assurance/improvement.
- » **Monitoring and analysis of the types of services and supports included in wraparound plans,** whether or not planned services and supports are provided, and whether or not the goals and needs that appear on wraparound plans are met.

- » **Data that can be used in an ongoing process to track satisfaction and buy-in among stakeholder groups**, including youth and families and representatives of partner agencies and organizations.
- » **Information that feeds a systematic process for identifying and addressing barriers** that prevent wraparound teams from doing their work and/or fully implementing their plans.

#### 4. What types of outcomes do communities typically measure?

As described above, wraparound projects may define success in many ways, so it is critical to convene a collaborative process to define what represents success in terms of ultimate outcomes. Information on outcomes should be relevant to funding decisions, policy discussions, and strategic planning. Outcomes that are chosen should be important to stakeholders as well as to families and reflect the values of wraparound; for example:

- » Enabling children and youth to be “at home, in school, and out of trouble”
- » Increasing child and family assets and strengths and reduction of needs
- » Improving caregiver well-being
- » Increasing family and youth empowerment

Short-, intermediate-, and long-term outcomes that are theoretically important in wraparound are outlined in the *Resource Guide* article “How, and Why, Does Wraparound Work: A Theory of Change” (Chapter 3.1). Outcomes that have been used in previous research are described in “A Narrative Review of Wraparound Outcome Studies” (Chapter 3.3) and “The Evidence Base and Wraparound” (Chapter 3.2).

#### 5. What types of Management Information Systems (MIS) are needed to support accountability?

Similar to deciding outcomes and process measures, deciding how to manage information collected in support of a wraparound project will necessarily be driven by local needs and resources. However, well-established wraparound initiatives tend to have MIS systems that can maintain information that serves a range of functions, including maintaining information on youth and families who are enrolled, authorizing services and making payments, and tracking youth and family outcomes. The



article “Supporting Workforce Development: Lessons Learned from Wraparound Milwaukee” (Chapter 5c.4) in the *Resource Guide to Wraparound* includes a detailed description of how Wraparound Milwaukee has built and integrated its MIS systems over time.

## 6. What are core steps to take to ensure accountability?

Accountability is more than just a research design of your wraparound effort. Some sites have relatively large resource pools to access in building and executing a research and data collection design. Other sites have minimal resources and are struggling just to get things aligned for implementation (rather than focusing on evaluation components).

Whatever category your project fits into, the

following steps can be helpful in ensuring adequate accountability:

### Define what you want to know:

- » Do you want to ensure a minimum level of practice?
- » Do you want to ensure the right fiscal expenditures?
- » What outcomes do you hope to achieve?
- » How will family perspectives on satisfaction and quality of the process align with the other three questions?
- » What decisions will this information inform?

### Define your data source(s):

- » Define an existing data source that would meet your information need
- » Outline question(s) for which you need additional information

**Fill in the blanks:**

- » Define what missing information you would need to answer your unanswered question(s):
  - + Do you have access to the information or will you have to create it?
  - + Do you have the staff to do that? If not, who will?
  - + Do you have the resources to do that? If not, where will you get them?
  - + Do you have the political will to do that?
- » Define what your unit of analysis must be:
  - + Individual families?
  - + Teams?
  - + Staff?
  - + Other?

**Establish a process for review:**

- » Define how frequently your results and information should be reviewed
- » Define who should be involved in reviewing them

**Establish your protocol for decision making:**

- » How will you interpret the data?
- » How will you use it to develop shared meaning among your stakeholders?

**Use the data to inform action:**

- » Stop doing something
- » Start doing something else
- » Get additional resources
- » Get more information

# Trouble-Shooting: Questions

## For wraparound supervisors:

These are individuals who are hired or will be hired to provide hands-on oversight, direction and coaching to staff members who work directly with families by using the wraparound process.

### Question:

I try to correct my staff but I often hear that since I've only supervised wraparound and never done it, I don't understand. What tips do you have?

### Answer:

Some supervisors find that taking responsibility to function as the wrap-around facilitator for a single family can be very helpful. Others place themselves in a co-facilitator role with staff. Still others spend time in the field and get a sense for the practice in that way. What is important is that you have a sense of the overall wraparound process, significant knowledge of component steps of

wraparound, and knowledge of the way your system operates. The advantage that you bring to the discussion is that you have enough distance to be able to see the entire process without getting caught up in the detail. Finally, use multiple data sources in providing feedback to staff, including your personal observations, family and team feedback, and outcome and fiscal data.

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## Question:

Our project has flexible funds available but we haven't developed any policies around the use of those funds. For some of our wraparound teams, the main strategy seems to be "have our flexible funds pay" for whatever is needed. How do I manage this?

## Answer:

It is not unusual for new wraparound projects to become focused on flexible funds as the solution to challenges. Effective flexible fund management should ensure this resource will be used in a manner that promotes accountability while ensuring that the spirit of flexibility is maintained. Develop simple rules that can be shared with all wraparound team members including families, professional partners and community representatives. Make sure your rules reinforce the initial goals for your project.

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## Question:

Wraparound is such a complex process; how do I hold my staff accountable for quality implementation of the wraparound process?

## Answer:

Because wraparound happens in communities and not offices, supervisors find that they need to spend "field time" with staff to ensure that the process is being implemented correctly and with quality. This includes not only attending team meetings but also accompanying staff to individual meetings with families

and other team members during the engagement phase of wraparound. Some supervisors will augment this field work through use of surveys (either telephone, in-person, or written) from family and other team members. Supervisors should also consider active monitoring of teams' progress toward achieving team goals or meeting family needs, and use these data in supervision. Finally, these practices should be correlated with individual outcomes for young people and families enrolled in wraparound (e.g., meeting needs, reducing problem behaviors, functioning better in school, home, or the community) to ensure that one informs the other.

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## Question:

Many of the families we have enrolled in wraparound need more than wraparound meetings facilitated by my staff. Yet many of our partners tend to think that “let wraparound do it all,” is the answer. How do I help them get past this idea that wraparound is the service?

## Answer:

While supervisors need to be focused on quality implementation of the wrap-around process, you should also focus on the range, mix and type of services and interventions that are being provided to families between team meetings. It's a good idea to keep track of these services and construct a report that comprehensively describes services used in wraparound. Some sites will organize this description of services by life domain while others will sort by service definition or setting (home, school, community). Use this report to coach your staff and inform your boss about the mix of services being used and to provide support for further developing the service array.

## Question:

Our project has a community team that provides oversight to our work even though my agency has the contract to implement wraparound. That community team often gives me feedback that I think conflicts with the spirit of wraparound. What can I do about this?

## Answer:

What wraparound means within a given community is something that evolves as people gain insight and experience. Often our cross-system oversight groups are convened after one workshop about wraparound – or less. It is often helpful to get community oversight entities to commit to deepening their knowledge about wraparound through workshops, research and in-depth discussions. Members of the group may even be engaged in the process of interviewing families and staff about their experiences. At the very least, they should be exposed to in-depth descriptions of such family and staff experiences.

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## Question:

In our community, everyone came together to start wraparound but now that we're up and funded it seems that I'm the only person responsible for implementation. What should I do as a supervisor?

## Answer:

It is often helpful for supervisors of wraparound projects to convene a group of supervisors from other systems to review implementation and continue to manage system barriers. Just because you've funded wraparound in your community doesn't mean that all policies are now compatible with wraparound. Gathering a group of supervisors to monitor and troubleshoot not only wraparound implementation but also cross-system participation in wraparound plans can be a very helpful way to keep others engaged.

## For wraparound managers:

These are individuals who provide management oversight to wraparound projects. These might be employees of service organizations, typically nonprofit, who have a wraparound project included in their department. Wraparound supervisors will typically report to managers directly, and they in turn report to administrators.

### Question:

If we have limited resources to commit to monitoring and accountability where should we start? What are the bare essentials?

### Answer:

How you prioritize your focus in the general area of accountability will vary based on local conditions. Each project should develop capacity to monitor satisfaction, outcome, fiscal and process indicators. Where you start and what you prioritize, however, is entirely dependent on local conditions. If you are worried about the quality of wraparound eroding, then start with process indicators. If you have concerns about your ability to achieve the original outcomes set forth

in your wraparound project, or have a need to demonstrate such outcomes to ensure sustainability, you may start with monitoring outcomes like placement. The point is to work to put all four components in place within a reasonable amount of time.

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### Question:

Do we really need players from all sectors of our community system at the community partnership group?

### Answer:

A number of communities have fostered wraparound with a single-system approach. Some of these projects have been relatively successful and have created important alternatives for young people and families. On the other hand, some

of these single-system wraparound projects have struggled over time. Some of these struggles are the result of a lack of clear understanding about the nature of wraparound. Often, there are multiple-system initiatives that look like wraparound but operate under a different name. In other systems, there are projects that use the name “wraparound” but don’t follow wraparound practices. Establishing community partnership and collective ownership is an important step in bringing coherence and consistency to wraparound within a given community. It can lead to greater sustainability for wraparound projects while also fostering greater cohesiveness among system players. Effective managers start where they must but continue to work for system coherence and integration around wraparound.

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## Question:

We have done “less formal” or “small W” wraparound as a single provider for years. Now it is time to step up and make it more formal and a bigger deal. Where should we start to be sure we do this stage of our development “right”?

## Answer:

Many provider organizations or departments find that the wraparound process feels familiar because they have tried to do work that is compatible with the philosophy for a long time. In formalizing your implementation, a good place to start is by working with other leaders to establish cross-system ownership of your wraparound initiative. This will help lead to a cross-system, community understanding of your newly formalized efforts. In doing this, ensure that your organization is open to input from community partners and that your staff are prepared to learn new techniques, approaches and assumptions.

## Question:

Flexibility and individualization are important concepts in wraparound and other services. How do we best manage the liability concerns and risks that come with developing this type of resource set in a community system?

## Answer:

All leaders in wraparound should abide by “responsible risk taking.” That means that you need to ensure that your staff are equipped with a sound approach to introducing issues of risk within wraparound teams and planning for mitigation of those risks. Some managers also create an oversight process that allows them to review unusual actions in wraparound plans. This oversight process may include a clinical review through a single agency or a cross-system review that brings a variety of perspectives. If you do elect to create a review process, you should establish the rule that this group may not simply change plans but instead should dialogue with individual teams to make suggestions for effective risk management.

## Question:

We have a contract to provide wraparound facilitation but we are also able to bill Medicaid for some of those duties. Shouldn't I try to maximize my Medicaid billing to ensure sustainability?

## Answer:

Many wraparound projects are implemented using a mix of contract dollars with billable sources. Using Medicaid to fund your wraparound project can be a good fiscal policy as long as using those billable definitions doesn't change your definition of wraparound. Managers should work with their project to find the right blend of dollars to ensure quality implementation, even if that means that billable rates are somewhat lower. Remember the point is not to bill a lot, but instead to use resources strategically to ensure quality family services and supports and achievement of program goals.

## Question:

Can one supervisor effectively supervise staff doing wraparound at the same time that they supervise staff doing another project?

## Answer:

Some projects are able to create dedicated supervisors for wraparound, while others are just don't have the resources. There is a learning curve for newly assigned wraparound supervisors, and it is important that you dedicate enough time and resources to allow the supervisor to learn about wraparound. Investing in site visits to other projects, finding training opportunities (either live or via webinars) and identifying networking opportunities are all important investments.

## For wraparound administrators:

**These are individuals who take on administrative and executive tasks associated with the wraparound project. These activities may include hosting the wraparound implementation staff or administering contracts that are passed through to implementation groups. These individuals may work for private non-profit or public sector organizations.**

## Question:

How do administrators help make sure that families get what they need from wraparound?

## Answer:

People often focus on wraparound as a process for getting to "out of the box" solutions for families. There is an emphasis on creating, molding, or finding just the right resource for individual families rather than selecting strategies from a prescribed menu of services and resources. Wraparound administrators learn that the trick seems to be more about getting

the right decision made, rather than getting the right service or contract in place.

Individualization is fostered by ensuring that wraparound policies and procedures lead to wraparound teams accessing what's needed. Administrators should focus on empowering individual teams with the ability to make decisions and giving teams the authority to follow through. Effective wraparound administrators focus on this team empowerment model rather than creating policies and procedures focused solely on consistent replication of a service.

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## Question:

**We are trying to choose what to measure to inform our implementation effort. Possible areas to measure include costs, satisfaction of those served, whether the process we use lives up to our expectations, and whether what we are doing is really changing lives for families. Do we really need to measure something in all four of these areas to effectively maintain accountability for our effort?**

## Answer:

Accountability is about developing structures and processes that help you identify your information needs, how you will get the information, how it will be analyzed, who the information will be presented to, and how that information will be used to make decisions about the life of the system of care you are developing.

This work often falls into four categories:

- » Costs
- » Satisfaction
- » Process adherence
- » Impact/outcome

It is not unusual for communities to develop accountability mechanisms for one or two of these areas, work on that for a while, and then move on to add in another focus area. The process of developing a full set of indicators can take a significant amount of time. Working toward a multi-tiered set of accountability measures is important and will require effort and resource commitments over time. This investment will support your effort to refine and improve your wraparound project based on locally developed and managed indicators sets that are relevant to the priorities you have chosen for your implementation.

## Question:

Wraparound has several staff roles including facilitator, parent partner, youth partner, and supervisor. Do these positions always need to be in place for all projects in order for us to call what we do “wraparound”? We are operating on a tight budget and are not likely to have all of the funds necessary for all of these positions.

## Answer:

Many sites struggle with ensuring the right mix of staff for implementation of wraparound. Minimally, you must have someone take on the role of facilitation of the wraparound process including meeting, team, and plan facilitation. Other roles are important and may be added later or can be built in through partnerships with other organizations. For example, some wraparound projects hire facilitators and pair each one with a peer support partner from other, existing, local initiatives.

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## Question:

What is the right balance between costs for doing wraparound, costs for needed support and services, and really flexible dollars for one-time, one-family expenses? How do we know if we allocated our resources correctly to support this work?

## Answer:

The right ratio is largely dependent on local conditions. If you are in a community that has developed a significant and broad-based partnership group, you may find that your need for flexible one-time dollars is less than for other communities because you can access in-kind options. Staff costs associated with the implementation of wraparound are also largely dependent on local conditions and the workload you’ve established for your wraparound staff. If they are expected

to do a great deal of paperwork or various other duties, you will need to spend a relatively larger share of funds for staff. Most projects begin by gathering information from a variety of other practitioners and starting with some sort of ratio. As the project matures, try to foster open discussions with partners and providers to try to establish the right amount and blend of funding to effectively implement wraparound. This information can be gathered retrospectively as more families are served and should inform future financial decisions.

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## Question:

**What should we do when the partnership feels unequal? For example, one system spends more money on our wraparound effort than the others and they seem to feel like they have a bigger stake and more power in the decisions we make. Is this okay?**

## Answer:

Wraparound investment is likely to vary from system to system and from time to time. In some states, wraparound is funded through a redirection of child welfare dollars while other states may see primary funding come from other systems such as mental health or juvenile justice. Managing this imbalanced investment requires strategic action. Some communities have established methods for decision making that are fair, open and transparent, while others have acknowledged the greater investment by giving those with a bigger stake a bigger vote. Some administrators find it helpful to acknowledge the more subtle investments made by those who don't come to the table with a big checkbook. Again, as with most things in wraparound implementation you must build on what you have and continue to work towards improvement over time, including movement toward greater system integration.

## Question:

How do we keep wraparound from being just another program in our system? How do we keep it alive as a change mechanism for the broader system?

## Answer:

Many sites struggle with ensuring the right mix of staff for implementation of wraparound. Minimally, you must have someone take on the role of facilitation of the wraparound process including meeting, team, and plan facilitation. Other roles are important and may be added later or can be built in through partnerships with other organizations. For example,

some wraparound projects hire facilitators and pair each one with a peer support partner from other, existing, local initiatives.

## For wraparound funders:

**These are individuals who make executive leadership and fiscal decisions related to developing and implementing wraparound within communities.**

## Question:

What outcomes should we track in our wraparound initiative?

## Answer:

Communities have tried many strategies to sort out this issue. The most important consideration is how to ensure that there are outcomes that you jointly own and track and report. Methods for picking

which ones you will prioritize can include:

- » Reviewing all indicators from all participants systems and selecting a subset that all systems track some information about.
- » Having each system identify one indicator that they are most concerned about

and then treating the composite group as the starter set of indicators for the project.

- » Developing a set of unique indicators that reflect the leadership perception of important things to track and monitor.

The important thing is to start tracking, monitoring, and analyzing outcome information from early in the project and to use this information for subsequent improvement efforts.

## Question:

**In our effort to build a collaborative body we have gathered people from different levels in their organizations. It does not always feel right for a direct line supervisor to carry the same weight as an executive director of one of our funders. What can we do about this without alienating representatives who are invested in improving care for youth and families in our community?**

## Answer:

Community partnership and collaborative bodies sound like ideas rooted in an egalitarian and cooperative tradition. While these ideals are a good thing, we need to be cautious about assuming that everyone at the collaborative table brings the same thing.

One option is to think about “tiering” participation in the community collaborative. This approach would match people from similar levels to work together to identify and resolve challenges in wraparound implementation that affect their level of the organization. This is a way to garner ideas and solutions from across the organizational levels while creating a role for multiple levels of input. Structures within collaborative bodies can include sub groups that are:

- » Task-focused; for example, workforce development, outcome management, and others; or

» Role focused; for example, executive level, supervisor level, or family representatives.

Healthy collaboratives find ways to use the talents of representatives in a way that is appropriate and respectful to their roles and expertise.

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## Question:

**How do we encourage providers in our community system to work together rather than compete for dollars and expertise?**

## Answer:

First of all, competition among providers can be healthy for system improvement. Competing to be the most flexible and responsive provider in the eyes of families is very different than competing to have the biggest budget. Leadership messages and decisions reinforce and shape opinions and perceptions of what

is important. Create opportunities for healthy competition by incentivizing the things that you value. If working together is one of those, then creating incentives for working together, rewarding it when it happens, and funding joint efforts are all strategies that can be effective at improving collaborative action at the provider level.

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## Question:

**What is the right “mix” of formal services and flexible funds to ensure that we have the right help available to families as we do wraparound?**

## Answer:

There is no known formula for figuring out this mix. It will depend on several factors including the type and volume of services currently available in your system and the depth of need and challenge faced by families. In order to keep the right balance in mind it is necessary

to track expenditures and service usage patterns by individual family. This can be done by creating a process that builds an individual budget by family and wrap-around team. This information can then be aggregated at the funding level. Funders should analyze this data, consider its connection to inputs and outcomes, and then make informed decisions about where to make fiscal commitments. Monitoring flexible expenditures may point to the need to make other investments. For example, a plethora of flexible expenditures clustered in one type of activity may lead to a decision to create a new service type or contract in the community system. This kind of process and analysis will lead to an improved “mix” of formal and flexible resources.

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## Question:

**Lots of wraparound projects seem to pool funds. We will not be doing that in our community. Does this mean we should not do wraparound?**

## Answer:

“Pooled” funds are often a symbol of multiple funders’ commitment to wraparound. The lack of ability to pool funds does not mean that you should abandon your wrap-around efforts. If you will not be “pooling” funds, just be sure to pay attention to increasing your abilities to:

- » Share specific, accurate, and up-to-date budget information;
- » Share dollars across systems for important investments in flexible responses for families and youth; and
- » Share, publicly and repeatedly, your commitment to collaboratively manage and improve care for youth and families.

These are the underlying functions that are addressed in pooling funds.

## Question:

**Starting a new project means new training for project staff and community members. How do we make sure we get the best possible training for our community?**

## Answer:

There are many places to search for a training resource that matches your community's needs. Scan your environment, find out who is doing wraparound, and find out who trained them. Check at the state level, the county level, and the provider level for organizations that have implemented wraparound. Interview them to ascertain their approach to training. A mix of outsider/expert (to get the latest and the best from the broader field)

and local experienced staff and leaders (to get the practical on the ground picture) creates the most effective balance.

It is also important to develop a plan for ensuring that you reach all of the right audiences with the right information at the right time. Wraparound managers need different information than families enrolled in wraparound. Additionally, training should be seen as an ongoing, iterative process that adapts over time to local conditions. This is likely to mean that you will need more than one trainer or training resource over time.

# Appendix A:

## Self-Assessment Of Strengths And Needs

### Community Groundwork for Wraparound Implementation: A Self-Assessment of Strengths and Needs

Theme 1: Community partnership	Is this happening?
An initial group of stakeholders has come together and made a firm commitment to moving forward with wraparound implementation	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
<b>This group currently includes, or is actively reaching out to...</b>	
... family members and youth and/or young adults who are “system experienced” including any family or youth support/advocacy organizations in the community	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT

**Theme 1, continued**

... representatives of key funders and key child- and family-serving organizations	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... agency and organization leaders who are able to commit resources and lead efforts to change policies	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
<b>Theme total (sum of four items):</b>	

Theme 2: Collaborative activity	Is this happening?
<b>The people who are planning for wraparound implementation...</b>	
... have a solid understanding of—and commitment to—wraparound principles and practice	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... are committed to making changes in their own organizations and in the larger system	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
...have reached a decision regarding who will be eligible for wraparound	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... are clear about the desired outcomes they hope to achieve	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
<b>Theme total (sum of four items):</b>	

Theme 3: Fiscal Policies and Sustainability	Is this happening?
<p><b>The people who are planning wraparound implementation have a basic understanding of what will need to be funded and approximately how much it will cost to fund the following core wraparound needs:</b></p>	
<p>Key staff roles, including facilitators, family partners, youth partners, supervisors and administrators</p>	<p><input type="checkbox"/> 1=NOT REALLY  <input type="checkbox"/> 2=SOME  <input type="checkbox"/> 3=QUITE A BIT</p>
<p>Training, coaching and supervision for key staff roles</p>	<p><input type="checkbox"/> 1=NOT REALLY  <input type="checkbox"/> 2=SOME  <input type="checkbox"/> 3=QUITE A BIT</p>
<p>IT or data management systems to track utilization, administrative data, and wraparound plans, progress and outcomes</p>	<p><input type="checkbox"/> 1=NOT REALLY  <input type="checkbox"/> 2=SOME  <input type="checkbox"/> 3=QUITE A BIT</p>
<p>People who are planning wraparound implementation understand the basic models and options for achieving adequate, stable funding for the wraparound effort</p>	<p><input type="checkbox"/> 1=NOT REALLY  <input type="checkbox"/> 2=SOME  <input type="checkbox"/> 3=QUITE A BIT</p>
<p style="text-align: right;"><b>Theme total (sum of four items):</b></p>	

Theme 4. Access to Needed Services and Supports	Is this happening?
<b>The people who are planning for wraparound implementation...</b>	
... have knowledge about the array of services that is typically needed for wraparound programs, including non-traditional services and supports, and are actively strategizing about how to fill gaps in the array	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... understand the role that informal and community supports play in wraparound, and are actively strategizing about how to increase community capacity to build and use such supports	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... understand the importance of peer support in wraparound, and are actively strategizing about how to ensure access to peer support	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... are actively strategizing about how to build community capacity to create completely individualized supports for youth, caregivers, and family members	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
<b>Theme total (sum of four items):</b>	

Theme 5. Human Resource Development and Support	Is this happening?
<b>The people who are planning for wraparound implementation...</b>	
... have a realistic understanding of what it takes to provide adequate training and coaching for key roles (facilitators, family/youth partners, supervisors), and are actively strategizing about how to ensure this for the wraparound project.	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... have a realistic understanding of typical staffing plans (including caseload sizes) that allow people in key roles (facilitators, family/youth partners, supervisors) sufficient time to provide high quality wraparound, and are actively strategizing about how to ensure this for the wraparound project.	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... have a realistic understanding of the structures and processes that are needed to ensure that people in key roles offer high quality supervision, and are actively strategizing about how to ensure this for the wraparound project	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... understand the need to get service providers and community partners “on board” with wraparound, and are actively strategizing about how to do this	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
<b>Theme total (sum of four items):</b>	

Theme 6. Accountability	Is this happening?
<b>The people who are planning for wraparound implementation...</b>	
... are exploring options for assessing progress and success in overall implementation of the wraparound project	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... are exploring options for measuring wraparound quality and other process outcomes	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... are exploring options for measuring utilization, costs and expenditures	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
... are exploring options for measuring child/ youth and family outcomes, including child/ youth and family satisfaction and other outcomes that families and youth care about	<input type="checkbox"/> 1=NOT REALLY <input type="checkbox"/> 2=SOME <input type="checkbox"/> 3=QUITE A BIT
<b>Theme total (sum of four items):</b>	

# Appendix B: Self-Assessment Tools For Leaders

## Self-Assessment Tools for the Leaders, Managers, and Planners of Efforts to Implement Wraparound

These self-assessments are designed to help wraparound leaders assess and plan for important aspects of the wraparound development process. Managers should answer these questions and use their answers to highlight strengths and challenges in their implementation. The six areas are the same six areas discussed in this *Guide*. These are also the six areas defined in the “Community Supports for Wraparound Inventory,” a resource developed through the National Wraparound Initiative. There is a self-assessment for each of the six areas:

- » *Community Partnership*
- » *Collaborative Action*
- » *Access to Needed Services and Supports*
- » *Fiscal Policies and Sustainability*
- » *Human Resource Development and Supports*
- » *Accountability*

The self-assessments are designed to help managers pinpoint the essential organizational and system supports they should develop to ensure quality wraparound practice at the family level. Completing the self-assessments will help these leaders, managers, and planners to:

- » Assess whether they have worked on the right areas to support an effective initiative
- » Gain a better sense of where to target improvement efforts and resources in the planning and implementation process
- » Identify when they may need to gather additional information in order to keep their system development efforts on track

The self-assessments were designed so that “Yes” answers reflect areas of strength. “No” answers are seen as reflecting an opportunity for improvement and development. As a strategic leader, you should review your answers and identify where you want to invest energy. Focusing on positive answers may help you to strengthen certain areas before tackling the areas of greatest challenge. On the other hand, as a strategic leader you may find that some “No” answers require attention for you to move on. You can go through these questions one theme at a time or complete the entire set of self-assessments in one sitting. The purpose of the self-assessment process is to help you guide your community effort more effectively and strategically. The self-assessments are a starting point rather than an ending point or destination. You can use these tools multiple times, and you may find that your answers may differ from one rating period to the next. Wraparound evolves and changes along with community context, people, and system development.

## Community Partnerships .....

This area of the self-assessment focuses on three key aspects of community partnership related to the implementation of wraparound. These areas are:

- » **Membership:** Are the right people participating from the right levels of the partner organizations?
- » **Structure:** Is there a structure that supports and encourages effective partnerships that translate hope into action?
- » **Process:** Are there processes in place that assist us in maintaining effective relationships, goals, and plans for our community service system?

Area	Questions to consider	Yes	No
Membership	Have you included a range of representatives from across the system?		
	» Families	<input type="checkbox"/>	<input type="checkbox"/>
	» System Partners	<input type="checkbox"/>	<input type="checkbox"/>
	» Community Representatives	<input type="checkbox"/>	<input type="checkbox"/>
	» Business leaders	<input type="checkbox"/>	<input type="checkbox"/>
	» Cultural Leaders	<input type="checkbox"/>	<input type="checkbox"/>
	Have you selected the right level of participation?		
	» Supervisors	<input type="checkbox"/>	<input type="checkbox"/>
	» Managers	<input type="checkbox"/>	<input type="checkbox"/>
	» Policy Makers	<input type="checkbox"/>	<input type="checkbox"/>
» Others	<input type="checkbox"/>	<input type="checkbox"/>	
Have you considered who's missing?	<input type="checkbox"/>	<input type="checkbox"/>	
Have you planned for how to secure their involvement?	<input type="checkbox"/>	<input type="checkbox"/>	

Area	Questions to consider	Yes	No
Structure	Have you designed a structure from which the community partnership can operate?	<input type="checkbox"/>	<input type="checkbox"/>
	» Is it mindful of the time, energy, and commitment of members?	<input type="checkbox"/>	<input type="checkbox"/>
	Is the scope of decision making clearly and openly articulated?	<input type="checkbox"/>	<input type="checkbox"/>
	Is this structure compatible with and tied to other structures currently operating within the community?	<input type="checkbox"/>	<input type="checkbox"/>
Process	Have you identified the process by which decisions get made?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you identified how to welcome, orient and remind members of our process and mission?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you established an effective communication network that will reach the right people and provide the right information?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you established a way to document your work and maintain your “wraparound memory” as membership changes?	<input type="checkbox"/>	<input type="checkbox"/>

## Collaborative Action .....

This section of the self-assessment focuses on the three areas for establishing collaborative action among stakeholders:

- » **Shared Leadership:** Have you worked with others including families to build support for your project?
- » **Guiding Plan:** Have you established a plan that is future-oriented, strategic and relevant?
- » **Organizational Integration:** Are you considering the entire system in your design?

Area	Questions to consider	Yes	No
Shared Leadership	Have you identified who your wraparound champions are, both within and outside the project?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you committed to identifying families and young people as allies and sponsors of your wraparound project?		
	» Are you putting families and young people forward with support, authority, and resources?	<input type="checkbox"/>	<input type="checkbox"/>
	» Have you committed to sharing decision making and power with them?	<input type="checkbox"/>	<input type="checkbox"/>
	» Are you willing to redistribute resources (personnel, time, space, equipment, funds, etc.) if family and youth voice leads to changes in some priorities or policies?	<input type="checkbox"/>	<input type="checkbox"/>
» Have you built an inclusive agenda with families and young people rather than for them?	<input type="checkbox"/>	<input type="checkbox"/>	



Area	Questions to consider	Yes	No
Organizational Integration (continued)	Have you identified staff job descriptions and roles for the project?	<input type="checkbox"/>	<input type="checkbox"/>
	» Are they compatible with wraparound values and real job expectations?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you notified other partners of your commitment to change?	<input type="checkbox"/>	<input type="checkbox"/>
	» Have you enlisted their participation?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created a means to identify, prioritize and implement changes that will give you the best leverage for quality wraparound implementation?	<input type="checkbox"/>	<input type="checkbox"/>

## Fiscal Policies And Sustainability .....

This area of the self-assessment focuses on resource issues including financial investments and includes the following areas:

- » **Wraparound Project Funds:** Have you invested enough to ensure that you will have the right staff and infrastructure to produce your desired outcome?
- » **Building Funding Streams for Necessary Services:** Is your project positioned to wisely distribute funds for both project implementation and individual family services/supports?
- » **Flexible Funds:** Are there clear, fair, quick pathways for flexible fund expenditures?
- » **Stewardship:** Does your management of flexible funds and resources reinforce the wraparound values and practices?

Area	Questions to consider	Yes	No
Wraparound Project Funds	Have you identified and secured funding for at least a minimum range of staff roles?	<input type="checkbox"/>	<input type="checkbox"/>
	Will staffing patterns/case loads allow staff members time to do key tasks well?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you identified what you will need in terms of supervision?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you budgeted for overhead costs including providing clinical consultation and support?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you identified and budgeted for the types of supervisory structures you will need to create?	<input type="checkbox"/>	<input type="checkbox"/>

Area	Questions to consider	Yes	No
Wraparound Project Funds (continued)	Have you budgeted for after-hours support and access to accommodate family needs?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you developed and budgeted for training and staff development strategies so that staff have adequate information?	<input type="checkbox"/>	<input type="checkbox"/>
Build Funding Streams for Necessary Services	Have you identified what funding streams can be used in support of individual wraparound plans?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you contacted other wraparound sites to project the range of services and supports that are typically needed?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you established funding for a front-end capacity so that families who enter wraparound in a high state of destabilization can access potent services and support quickly?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you identified an integrated paper trail to avoid duplication on the part of direct service staff, particularly when multiple funding streams are accessed?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you identified opportunities to impact funding streams at the policy level to ensure that flexibility can be enhanced for children and families?	<input type="checkbox"/>	<input type="checkbox"/>

Area	Questions to consider	Yes	No
Build Flexible Funds	Have you identified policies for management of your flexible funds?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created easy ways to access cash or checks?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you established clear definitions about flexible funds and their use?	<input type="checkbox"/>	<input type="checkbox"/>
Stewardship	Have you set forth policies for use of flexible funds?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you sought feedback from youth and families about those policies?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you avoided setting hard and fast rules but instead created thinking policies for staff to use openly with families?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you made sure you are balancing the right ratio of staff roles with the right mix of direct service and the right mix of flexible funds?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created a transparent policy to seek exception to policies set forth to make sure that outlying situations with families can be considered?	<input type="checkbox"/>	<input type="checkbox"/>

## Access To Needed Services And Supports .....

This area of the self-assessment focuses on the need to build a range of flexible, responsive and creative services and support for families enrolled in wraparound. Areas of focus in this area include:

- » **Creativity:** Have you ensured that a range of helping activities is available to families through this process?
- » **Wide Range of Options:** Are you maximizing choice for families and individual teams in arranging or delivering services and supports?
- » **Ensuring Open Doors:** Have you created simple and straightforward ways for people to access help?
- » **Just-in-Time Help:** Have you developed efficient ways for timely response?

Area	Questions to consider	Yes	No
Creativity	Are you working with current providers to tailor interventions?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you made it possible for as many different types of help to be available to families through as many of your partners as possible?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you worked to define the difference between getting a service and getting needs met?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you arranged resources (personnel, contractual, others) to ensure that unique services and supports can be created?	<input type="checkbox"/>	<input type="checkbox"/>
	Can teams build and get support for a created intervention that is right for just one family?	<input type="checkbox"/>	<input type="checkbox"/>

Area	Questions to consider	Yes	No
Wide Range of Options	Have you reached out to and included a broad array of providers? Even those who are not usually considered?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you built an understanding that effective help reaches beyond service boundaries and definitions?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you arranged enough flexibility of resources to support highly individualized supports for families?	<input type="checkbox"/>	<input type="checkbox"/>
Ensuring Open Doors	Do you have a clear plan for how supports and services will be accessed and connected to families?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created capacity to connect with an “off-line” provider as an exception to policy?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created a crisis capacity? » For on-call? » For mobile response? » For access to community resources?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Just-In-Time Help	Have you effectively planned for getting help to families in a timely way throughout this effort?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you developed a way for services to cease when they are no longer needed?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created fast-track agreement procedures so that paperwork will never prohibit service access?	<input type="checkbox"/>	<input type="checkbox"/>

## Human Resource Development and Supports .....

This area of the self-assessment is focused on human resource issues as they relate to your wraparound implementation. Specific areas in this section include:

- » **Adequacy of Staff and Roles:** Have you developed a plan to get the right people in the right role with the right tools to do the job?
- » **Comprehensive Performance System:** Have you created methods for assessing and supporting continual development of staff competence?
- » **Family Involvement:** What have you done to involve families in all aspects of workforce development?

Area	Questions to consider	Yes	No
Adequacy of Staff and Roles	Have you outlined the key roles needed to operate successfully?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you developed job descriptions that are accurate and values based?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you defined what key features you will need in successful candidates?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a recruitment strategy in place? What is it and how is it different from recruiting for other positions?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you built the steps for hiring the right employees for the positions you have planned?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you developed a training strategy? What are the types of knowledge and skills you will need addressed, and by when?	<input type="checkbox"/>	<input type="checkbox"/>

Area	Questions to consider	Yes	No
<b>Adequacy of Staff and Roles (continued)</b>	Do you know how you will orient staff to the goals of the project on the very first day?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you developed a process for monitoring workload issues to ensure adequate staffing patterns?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you created internal and external partnerships that will allow your wraparound staff to function successfully?	<input type="checkbox"/>	<input type="checkbox"/>
	Are there unique roles that will require unusual or nontraditional supervision? How will you access this support?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Comprehensive Performance System</b>	Have you established key benchmarks for staff and program performance?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you established open feedback loops so staff can receive positive and corrective feedback?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you linked program performance to employee performance?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you know the mechanism you will use to summarize performance information to employees, funders and internal administrative roles within your organization?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Family Involvement</b>	Have you involved families in recruitment and interviewing for positions?	<input type="checkbox"/>	<input type="checkbox"/>
	How will you involve families in providing feedback for staff around program and personnel performance?	<input type="checkbox"/>	<input type="checkbox"/>

## Accountability .....

This area of the self-assessment focuses on quality assurance improvement processes. You should use this to determine measures for accountability and how you will get enough information to use in program improvement. Specific areas in this section include:

- » **Key Outcomes:** Have you identified the key results or impact you are expecting?
- » **Management of Key Process Elements:** Have you identified what practices you want staff to follow with individual families?
- » **Youth and Family Issues:** Have you identified and involved families in determining satisfaction measures?
- » **Community Processes:** Have you built an awareness of anticipated community, organizational and system change activities?
- » **Costs:** Have you reached consensus about the right amount of fiscal investment you expect to make to get your desired results through following your prioritized practices?

Area	Questions to consider	Yes	No
Key Outcomes	Have you articulated what you hope to accomplish for the people you are helping?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a plan for how you will measure it?	<input type="checkbox"/>	<input type="checkbox"/>
	» Have you catalogued the sources of information that are available to you?	<input type="checkbox"/>	<input type="checkbox"/>
	Are you clear about what your funders care about?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a plan for how you will summarize outcome information for staff?	<input type="checkbox"/>	<input type="checkbox"/>

Area	Questions to consider	Yes	No
Key Outcomes (continued)	Have you determined the level of outcome achievement you hope to see? What can you settle for?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you decided what type of post-completion follow-up you will use and how long after services are over you can check to determine effectiveness?	<input type="checkbox"/>	<input type="checkbox"/>
Key Process Elements	Have you identified which practices within wraparound you care most about? How will you monitor whether those are happening?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have linkages to any research projects?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a plan for how to use process information in program improvement?	<input type="checkbox"/>	<input type="checkbox"/>
Youth/Family Specific Issues	Have you determined if there is anything unique about your target population that you need to/want to monitor?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a plan for how you will measure the family's experience of your project?	<input type="checkbox"/>	<input type="checkbox"/>
Community Processes	Have you articulated what you expect the community impact of the project to be?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you have a plan for how you will determine if your system is changing? For the better? For the worse?	<input type="checkbox"/>	<input type="checkbox"/>

Area	Questions to consider	Yes	No
<b>Costs</b>	Do you have a way to track current and future costs of care?	<input type="checkbox"/>	<input type="checkbox"/>
	Do you know what sources of funds those costs include?	<input type="checkbox"/>	<input type="checkbox"/>
	Have you examined what is a reasonable expenditure outlay per family? » Will you know when it is too much? » When is it too little?	<input type="checkbox"/>  <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/> <input type="checkbox"/>
	Do you have a plan for how to consider expenditures across life domains and sort out what that suggests for your system of care in terms of program development?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other</b>	Have you planned for how frequently you will need this information for it to be perceived as useful to the project?	<input type="checkbox"/>	<input type="checkbox"/>

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This guide covers the **Six Themes of Wraparound Implementation** and how you can apply them in your program:

1. **Community Partnership**
2. **Collaborative Action**
3. **Fiscal Policies And Sustainability**
4. **Access To Supports And Services**
5. **Human Resource Development**
6. **Accountability**



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