

## Conduct the Staffing

The development of the ISP is the core activity of the CRCG. As mentioned in previous sections, the CRCG should inform the individual or family about the CRCG staffing process, including the creation of their ISP. The CRCG must ensure that the individual or family members sign all appropriate consent forms and that each member in attendance has signed a confidentiality agreement or has one on file before hosting the staffing.

Below is a sample agenda for a staffing to develop an ISP:

### Staffing agenda to develop an ISP

- I. Welcome individual, family, and representatives
- II. CRCG member introductions
- III. Individual, family, or caregiver information sharing
- IV. Identifying strengths and needs
- V. Build the ISP
- VI. Summarize and approve the plan

(Repeat for each individual or family)

## Introductions

Creating a welcoming environment and facilitating introductions set the tone for the CRCG meeting and staffings. Introductions should make the individual or family and other guests feel welcome and comfortable.

Some CRCGs have a member greet the individual or family before their meeting and answer any last-minute questions. When they arrive in the meeting room, the meeting facilitator should warmly welcome the individual, family, and anyone accompanying them. If available, provide water and a notepad and pen in case they want to take their own notes. Next, the referring member should introduce the individual or family being staffed and any other guests, including caregivers. Often the referring member or the CRCG's family representative sits with the individual, youth, or family to provide additional support.

Members should introduce themselves to guests by briefly identifying who they are and what agency or services they represent. Name tents and name tags are helpful to ensure everyone knows each other and what agency they represent. Avoid using acronyms and if possible, provide the individual or family with a list of brief explanations of programs and services in attendance.

Try to open the staffing with a conversation or activity to help promote a comfortable place before sharing experiences. The meeting facilitator should then briefly review how the staffing will work and what to expect.

## **Individual, Family, or Caregiver Information Sharing**

After introductions, the meeting facilitator will ask the individual or family to share how the CRCG can help. Before starting the discussion, consider the individual or family's felt safety. To create a safe space for discussion:

- Clearly explain their right to confidentiality and the limits thereof, including instances in which the right must be abridged.
- Practice strategic sharing: identify what information is supportive and needed.
- Be sensitive to information that may be difficult for the individual to share.
- Be mindful of the power dynamics between members and the individuals and families within the meeting.

Invite the individual or family to briefly identify what brought them to the meeting and what they need from the CRCG. If the youth is present, allow the youth to share their own information at the staffing and support them in strategic sharing. If the youth, individual, or family is not comfortable in this role, the referring entity such as a service coordinator or case manager may speak for them. This process should be planned in advance to ensure they are as comfortable as possible and know what to expect.

It is helpful for the facilitator to summarize what is being requested and to ask the individual or family for confirmation. For example, "I understand that you would like help in getting computer training, finding a job, and arranging transportation to and from work. You would also like help getting child support for your children and finding a better place to live. Is that correct? Would you like to add anything? Is there anything else you need?"

## **Identifying Strengths and Needs**

Next, members should respectfully ask questions to identify strengths, clarify needs, and to increase their understanding of the individual or family's circumstances. Some things the CRCG may want to ask include:

- The types of services they received before and how successful they were.
- Their goals.
- Their strengths and supports.
- The types of activities they enjoy.

Remember to use language that is understandable for everyone, avoid acronyms or technical terms. Ask clear questions that help the individual or family feel that they are in control of the meeting. When asking questions, focus on what information is

needed to make recommendations on the ISP. If the youth is present, include them in the conversation.

It is important to maintain a strengths-based approach and avoid focusing solely on the negative. Include questions that intentionally identify strengths and interests of the youth, individual, family, or caregiver(s). Questions should be specific to each person to help inform the ISP. Asking questions to elicit strengths also engages the individual or family and motivates participation in ISP planning and implementation. As the CRCG and the youth, individual, or family discuss their strengths and concerns, ensure that a CRCG member, typically the data reporter or secretary, is keeping track of the discussion with the Data Tracking Worksheet.

The meeting facilitator should summarize the strengths discussed and priority of needs and ask for confirmation from the individual or family.

## **Build the Individual Service Plan**

Together, the CRCG and individual or family identify services and supports that match their identified strengths and address their needs. Before offering a service, members should take into consideration the individual's previous agency experiences and recognize systematic trauma that may have occurred that impacts their comfort level with providers and services. It is important to ask the individual or family for feedback to ensure that a service, resource, or action proposed would be beneficial and fits with their values, cultural beliefs, family structure, or routine. The CRCG may want to write down the services on a flip chart as they are being offered as a visual tool that supports discussion of the plan as it is developed.

One of CRCGs' goals is to help people stay in their communities, and whenever possible, the ISP should recommend community-based services. If services outside the community are necessary, they should be in the least restrictive environment possible. When placement is necessary, the ISP should include a reintegration plan for the individual to return to the community and family.

When explaining available services and supports, members provide essential information for each service, resource, or action, including timelines, contact information, potential costs/payment, etc. The time requirements of the service must be identified. For example:

- When will it start and end?
- Can it be extended?
- Are there pre-requisites to begin the service?

If the person served is a transition-age youth, keep their age in mind when suggesting recommendations. Discuss with them a plan to ensure that services and supports will continue as they transition to adulthood.

It is helpful to include next action steps in the ISP to clearly indicate what the referred person or organization is responsible for after the CRCG meeting. Action steps are specific efforts that are made to help the individual or family reach their

goals. Many of the action steps should be the responsibility of the CRCG or assigned agency. They should be concrete and comprehensive, and each action step should explain:

- What will occur.
- Who will carry out the actions.
- When the actions will take place.

## **Summarize and Approve the Plan**

After all the services and resources are identified, the individual or family and the providing entities review the recommendations together and reach an agreement on the plan. CRCG leadership should ensure that there is a method in place to assemble the plan elements into an ISP form during the meeting. The State CRCG Office provides an ISP template (available on the [website](#)) or the CRCG may create their own. As the recommendations are finalized, the member responsible for data tracking should make note of which services and supports are recommended in the Data Tracking Worksheet.

A CRCG representative and the individual or family need to sign the ISP recognizing that together they have identified services to promote the referred person's success. The individual or family and each participating organization should receive a copy of the ISP. The CRCG leadership must also maintain a copy for records keeping purposes.

The ISP will also include information about what agency or person will take the lead supporting the individual or family in implementing the plan. Usually this will be the organization that is contributing the most services or it may be the organization with whom the individual or family is most comfortable. If the individual or family has a case manager or a service coordinator, they should oversee the implementation of the ISP. The lead entity will maintain communication with other contributing entities to ensure services are provided in a coordinated manner. Release of information agreements must be in place between all participating entities to continue communication. The lead entity will report follow up information to the CRCG at prescribed intervals.

## **Maintain Staffing Records**

Each staffing record should include the referral form, the ISP, release of information forms, sign-in sheets, copies of data collection forms, and any information from the individual or family made part of the ISP record. Records containing confidential information and PHI must be handled according to state and federal laws such as HIPAA, as well as your agency's policies. Files containing confidential information will be stored in a locked cabinet behind a locked door. Retain records for two years after service coordination is conducted. After this time, documents containing sensitive and confidential materials must be destroyed.

The CRCG should determine who will be charged with maintaining these records. The Chair should ensure that, no matter who is keeping the records, adequate security measures are in place to maintain confidentiality.