

# The Role of Management in System of Care Initiatives

New Community  
Webinar Series

January 6, 2010



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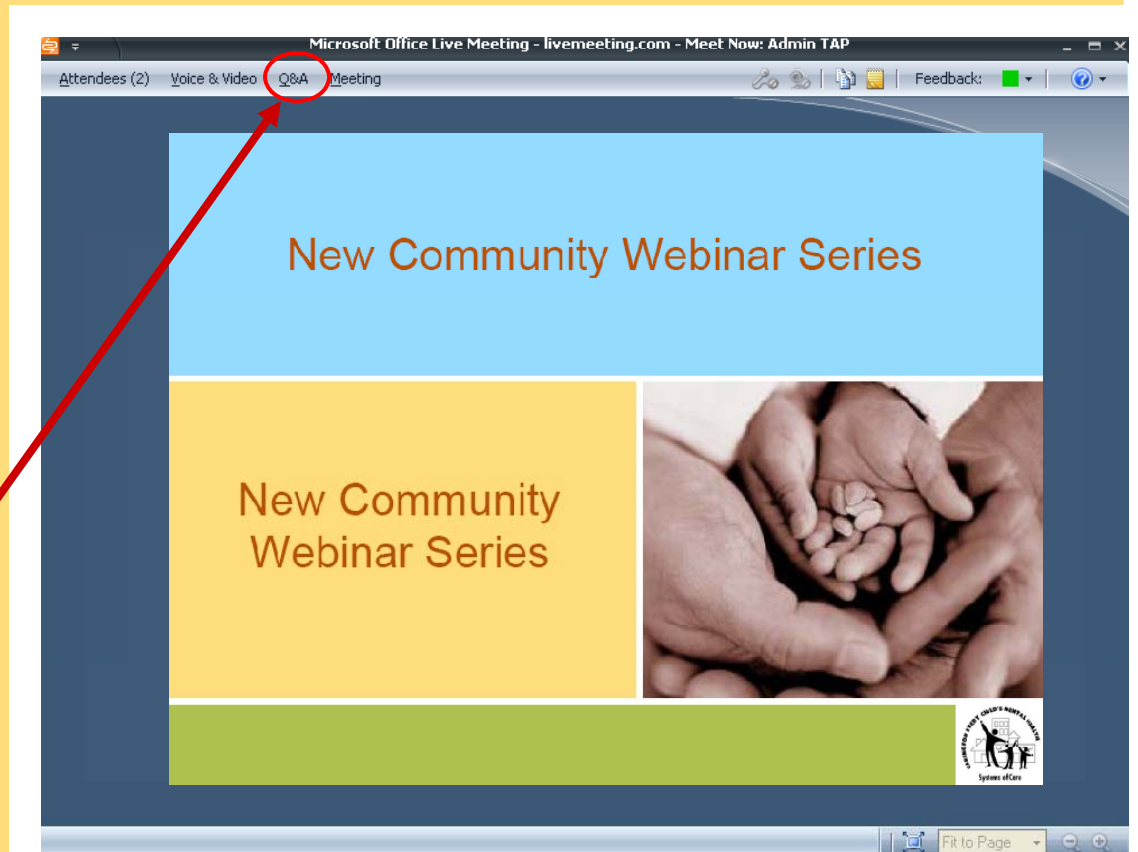
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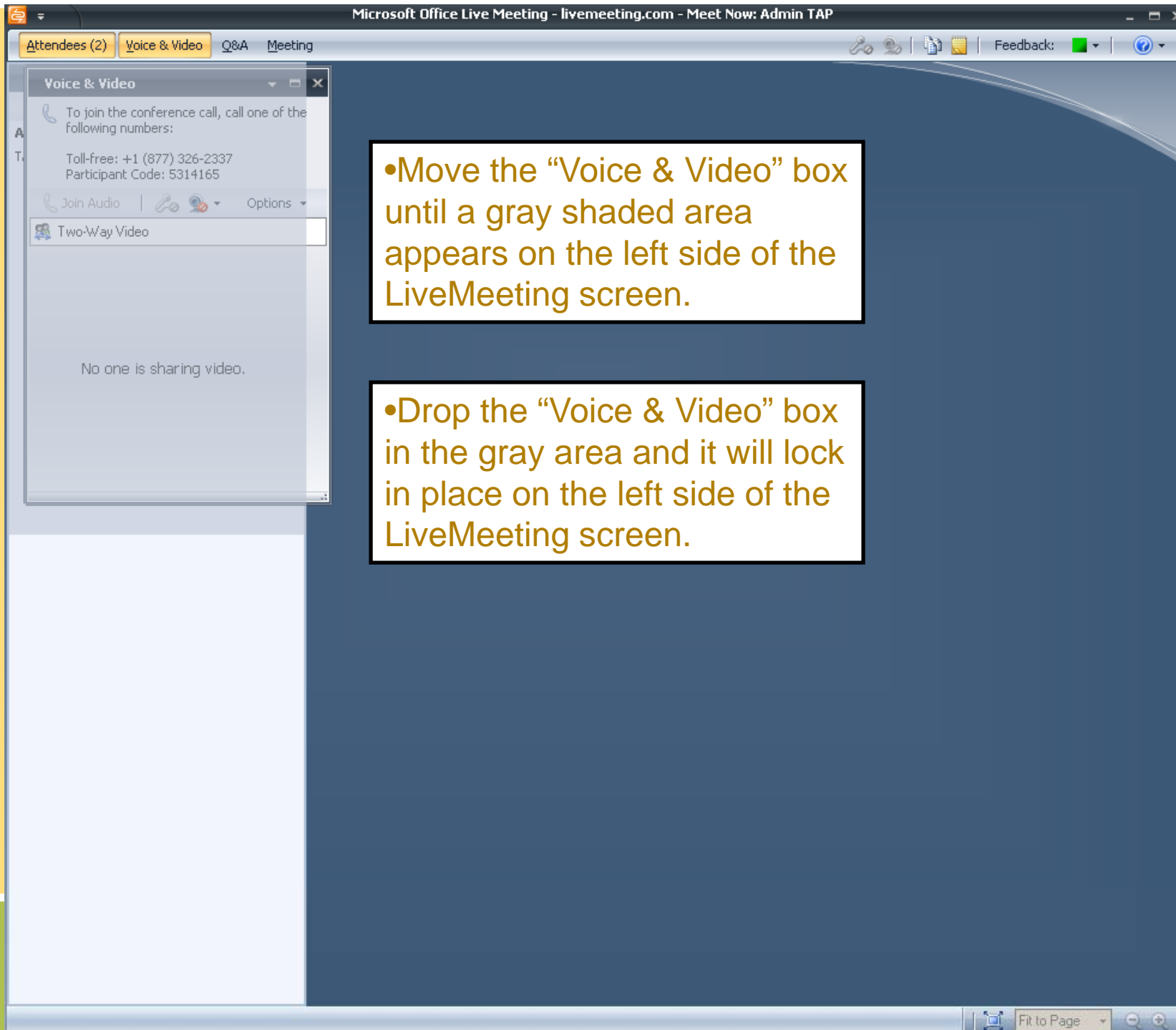
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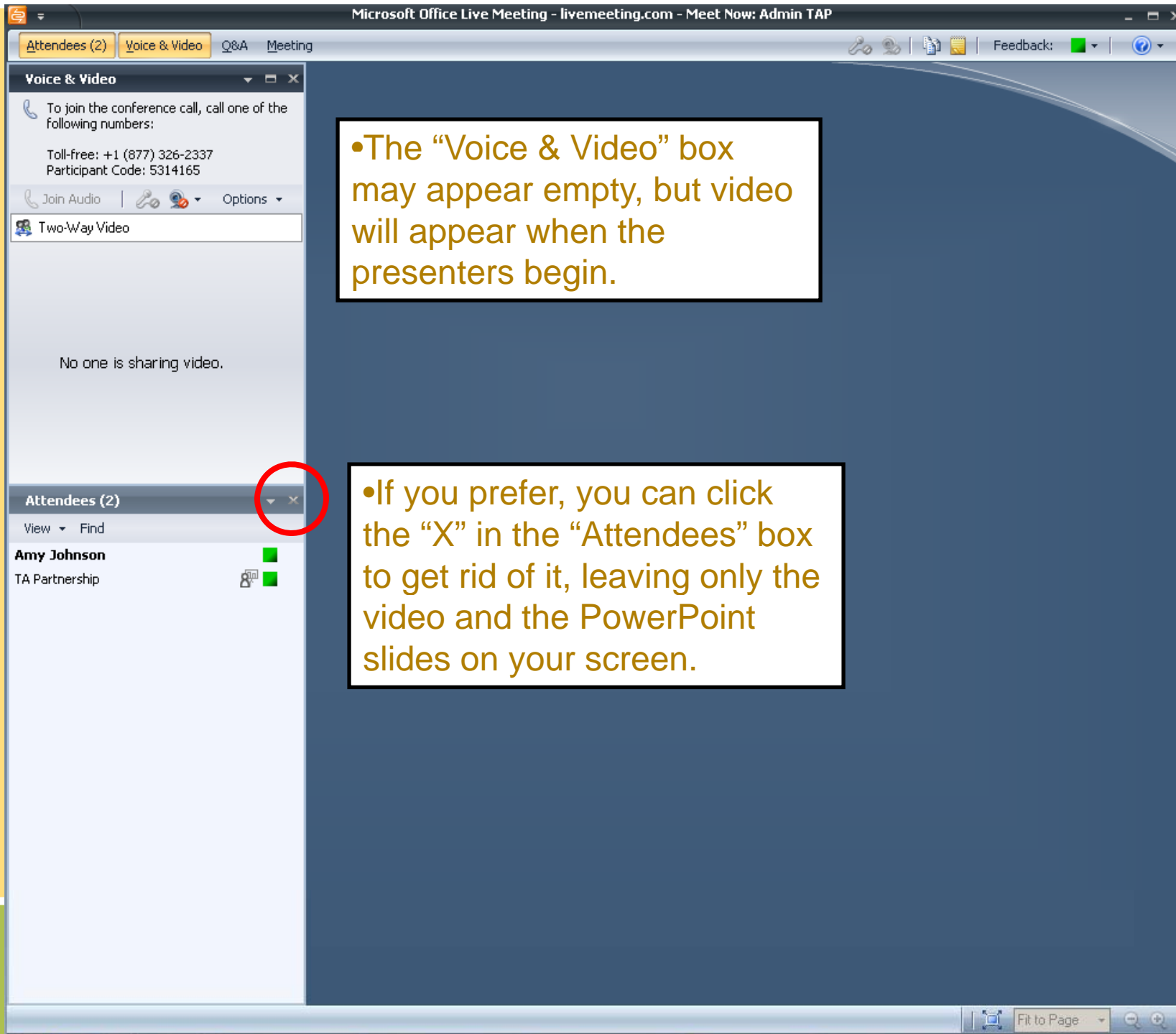
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# The Role of Management in System of Care Initiatives

## Presenters:

- **Frank Rider**, *TA Coordinator*, Technical Assistance Partnership
- **Beth Piecora**, *Family Advocate and Organizational Consultant*, Piecora and Associates



# Early SOC Management Tasks

- Developing infrastructure
- Navigating administrative structures
- Building a team
- Managing complex budgets
- Managing workflow
- Managing and resolving conflict
- Implementing transformative work

# Key Components for Infrastructure

- Clarify administrative structure
- Clarify principal investigator (PI) and project director (PD) roles
- Clarify contractual roles
- Align management with governance
- Establish and document procedures, policies, and traditions

# Project Management Responsibilities

- Developing human resources
- Strategic planning
- Workflow management
- Resource planning
- Managing for quality
- Managing risks
- Team leadership
- Progress reporting and CQI

# Transformation

- President's New Freedom Commission (2003)  
<http://www.mentalhealthcommission.gov/reports/FinalReport/toc.html>
- Partnership of personalized care - choosing *who, what, how* to provide appropriate care:
  - Which professionals are on the team
  - Sharing in decision making/option to disagree
- Transformation Equation:

$$T = (V+B+A) \times (CQI)^2$$

# The Project Management Staff Team

- T E A M - Your management team as a collective.
- Integration, not isolation - Don't isolate the individual members of the team.

# Effective Leadership

- Visionary
- Flexible
- Managing the chaos of transformation
- Anticipates conflict and manages and resolves it
- Forge positive internal and external relations

# Questions?

Please press \*7 on your phone to unmute your line.

When you are finished, please press \*6 to remute.

# Principal Investigator

- Responsible for fiscal and administrative oversight of the cooperative agreement
- Responsible and accountable to funded community for the proper conduct of the cooperative agreement
- May serve as, or designate, a liaison with State officials and agencies
- Partnership with project director in communication with CMHS

# Project Director

- Provide leadership
- Ensure and support family/youth voice and participation
- Oversee and support development of theory of change
- Oversee and support strategic planning
- Manage implementation of strategic plan
- Oversee program services, evaluation, and CQI

# Building Your Team

Hire and supervise key staff, including:

- Lead family contact
- Technical assistance coordinator
- Clinical director
- Evaluation team
- Social marketing leader
- Youth coordinator
- Cultural and linguistic competence coordinator

# Lead Family Contact

- Ensure SOC supports effective family participation in all activities
- Ensure SOC has access to family expertise for all activities
- Partner with stakeholders and staff to identify families of the population of focus to be involved in SOC activities
- Participate in developing theory of change and strategic plan, and support families to participate meaningfully
- Oversee, implement, and monitor progress of strategic plan, especially in goals and objectives focused on family involvement
- Coordinate ongoing training and TA to build family leadership, family and professional partnerships, and family-driven practices
- Participate in the ongoing management of the SOC
- Infuse family voice in policy, procedures, and service delivery

# Involve Family Members and Family Organizations in SOC Management:

- What are the GFA expectations concerning family and youth involvement?
  - ✓ Lead family contact must be an integral part of management team
  - ✓ Involve family organizations
  - ✓ Provide financial support for family participation
- Implement your commitments in the GFA
  - ✓ Key: Develop “mechanisms for ensuring the full participation of families, youth, and family run organizations in decision-making, governance and evaluation”

# Parent/Professional Partnerships Families and Youth in the Work Place

## Get the FACTS:

- Flexibility
- Accountability
- Compassion
- Training
- Support

Citation- Beth Picora, Picora & Associates



# Resources for Developing Family/Professional Partnerships

- TA Partnership Content Specialists
- National Federation of Families for Children's Mental Health
- National Alliance for Mental Illness/Child Adolescent Network
- Current literature on family/professional partnerships
- "Making It Work: When Families that Represent a Service Population Become Employees" - Consortium for the Employment of Parent Representatives, [FL] 2002

# Evaluator

- Collaborate to help develop theory of change, identify program outcomes, and determine progress indicators and outcome measures
- Develop evaluation committee, plans, data reports, and interpret findings for management and stakeholders
- Implement the national evaluation protocol
- Develop and implement a local evaluation plan in conjunction with all partners and stakeholders to address local priorities and outcomes
- Ensure meaningful participation by family, youth, and community members in all evaluation processes
- Collaborate with social marketing on effective use of data to ensure sustainability

# Social Marketing Leader

- Work with project director and other key staff to support system of care development
- Participate in activities to build relationships with partner agencies, youth, families, media, health care providers, policymakers, and others
- Collaborate with staff and social marketing planning committee to complete communications activities in a timely and cost-effective manner
- Develop media products to inform the general public and support sustainability

# Questions?

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# TA Coordinator

- Assist in creation of SOC logic model and strategic plan
- Develop training and technical assistance plans based on the strategic plan, and on assessment of community needs
- Establish training/TA committee with broad representation to plan and coordinate work
- Schedule, coordinate, advertise training and TA events
- Track participation in and effectiveness of training and TA efforts
- Ensure participants can learn in a culturally sensitive, family- and youth-friendly manner
- Build relationships with SOC stakeholders, youth, and families
- Develop interagency training initiative with child-serving agencies

# Clinical Director

- Teach providers how to apply SOC values and principles in services
- Model meaningful involvement of families and youth in services
- Establish family-driven, youth-guided service planning processes
- Track indicators and data to inform clinical decision-making:
  - at the youth/family level
  - and at the program/system level
- Identify service gaps and develop strategies to address them
- Lead process to select evidence-based interventions that match and fit (e.g. culturally) the needs of children and families
- Ensure that family and youth mentoring supports complement individualized community-based treatment plans
- Ensure that services are provided by appropriately prepared and well-supervised personnel

# Youth Coordinator

- Educate youth, families, and stakeholders about the value of authentic youth voice in:
  - individual treatment planning
  - service delivery
  - system design, evaluation, and
  - governance of the system of care
- Identify barriers and develop solutions
- Collaborate within management team to develop culturally competent services and policies for youth
- Identify learning needs, resources, and opportunities
- Plan for and manage budgeted youth involvement resources
- Build relationships with system of care stakeholders
- Ensure the continuity of youth voice within sustainability plans

# Cultural and Linguistic Competence (CLC) Coordinator

- Work with project director, CLC Committee, and stakeholders to provide leadership to develop, implement, and monitor CLC portion of strategic plan
- Present SOC principles and practices to engage cultural partners in SOC initiative
- Provide guidance to infuse CLC in policies/procedures, service delivery
- Guide development of strategies to promote internal accountability for the SOC's cultural and linguistic competence
- Integrate CLC principles throughout the evaluation and sustainability process
- Along with social marketing, establish and sustain relationships with cultural communities, families, youth, and providers

# Cooperative Agreement Requirements and Expectations:

Secure approval by CMHS for:

- Key personnel listed in GFA
- Change in scope of cooperative agreement
- Change in contractor or subcontractors
- Major budget modifications
- Carryover funds/no-cost extension
- Publications and products

# Cooperative Agreement Requirements and Expectations:

- Progress reports
- Annual reapplication
- Financial reports: matching funds, Financial Status Review (FSR), carry forward unspent funds
- Accountability to SAMHSA:
  - Lines of communication/authority
  - Periodic calls with federal project officer
  - Site visits
  - Special terms and conditions

# Questions?

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# Presenter Contact Information

- Frank Rider: [frider@ffcmh.org](mailto:frider@ffcmh.org)
- Beth Piecora: [bpiecora@tampabay.rr.com](mailto:bpiecora@tampabay.rr.com)

# Upcoming Webinars

- Understanding the System of Care Implementation Self-Assessment Process
  - January 13, 2010, 3:00 – 4:03 p.m. ET
- Building an Infrastructure for SOC: Broad-Based Governance
  - January 20, 2010, 3:00 – 4:30 p.m. ET

<http://www.tapartnership.org/events/webinars/default.php>

