207
Introduction to Family Group Decision Making (FGDM): Part II

Standard Curriculum

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For:
The Pennsylvania Child Welfare Resource Center

University of Pittsburgh, School of Social Work

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Agenda for Two-Day Workshop on
Introduction to Family Group Decision Making (FGDM): Part II

Day One

Agenda for Two-Day Workshop on
Introduction to Family Group Decision Making (FGDM): Part II

Day Two

Estimated Time	Content	Page
45 minutes	Section V: Preparing for the Meeting: Working with Service Providers (Continued from Day 1)	26
2 hours, 20 minutes	Section VI: The Meeting: Phase I & Phase II	33
35 minutes	Section VII: The Meeting: Phase III	42
20 minutes	Section VIII: The Meeting: Phase IV	46
20 minutes	Section IX: After the Meeting: Plan Follow-up/Meeting Follow-up	49
1 hour, 25 minutes	Section X: Mock Family Group Decision Making Meeting	52
15 minutes	Section XI: Wrap-up and Evaluation	55

207: Introduction to Family Group Decision Making (FGDM): Part II

Section I: Welcome and Introductions

Estimated Length of Time:
35 minutes

Learning Objectives:
Participants will be able to:
- ✓ Describe the workshop rationale, learning objectives, and agenda.

Method of Presentation:
Lecture, Small Group Activity, Large Group Discussion

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Name Tents (Printed on three different colors of paper)
- ✓ Overhead Projector/Screen
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Appendix #1: The Values and Beliefs of FGDM**
- ✓ **Handout #2: Agenda**
- ✓ **Handout #3: Competency and Learning Objectives**
- ✓ **Handout #4: Idea Catcher**
- ✓ **Poster #1: The Four Stages of FGDM**
- ✓ **Poster #2: Stacking for Success**
- ✓ **Poster #3: The FGDM Meeting**
- ✓ **Poster #4: The FGDM Meeting Guidelines**
- ✓ **PowerPoint Slide #1: Introduction to Family Group Decision Making (FGDM): Part II**
- ✓ **PowerPoint Slide #2: Section 1: Welcome and Introductions**
- ✓ **PowerPoint Slide #3: Name Tents**
- ✓ **PowerPoint Slides #4-5: Agenda**
- ✓ **PowerPoint Slide #6: Competency and Learning Objectives**
- ✓ **PowerPoint Slide #7: Strengths Interviews**
- ✓ **Table Resource #1: Guidelines for Family Group Decision Making in Child Welfare**
- ✓ **Table Resource #2: Pennsylvania Family Group Decision Making Toolkit: A Resource to Guide and Support Best Practice Implementation**

Section I: Welcome and Introduction

Pre-training Considerations:

The training room should be set up to accommodate the specific size of the audience to ensure that individuals can have optimal viewing throughout the training. On the section cover pages, you will find Trainer Prepared Flip Charts. In advance of the training, you should prepare these flip charts – *e.g.*, the *What's In It for Me* and *Parking Lot*. In addition to preparing flip charts, you may need to perform other work prior to the training that assists your training efforts. Please read the entire curriculum prior to your delivery date to allow you time to prepare for delivery. Before participants enter the room, the *Parking Lot* and *What's In It for Me*? posters should be posted.

In addition to tying content to participants' expertise, you should also offer "Tips" and/or "Tricks of the Trade." Whenever possible, ask participants for their tips and tricks as well. Tips and tricks should be offered throughout the training day. They could include concepts such as how to tear off flip chart paper without shredding it, alternating colors used when creating lists on flip charts, preparing tape "doughnuts," *etc.*

In addition, much of the content is lecture-oriented due to the large amount of information that needs covered in the time allotted. Whenever possible, offer the general concept being covered, solicit participant feedback, and then offer specific content. Also, always ensure that you seek participant feedback on the information presented.

Prior to participants' arrival, display **PowerPoint Slide #1 (Introduction to Family Group Decision Making (FGDM): Part II)**.

In your training materials, you will find name tents printed on four different colors of paper. Prior to participants' arrival, it will be necessary to place three of the four different colored name tents in separate piles according to color beside the sign in sheet. As participants arrive, ask participants who intend to be coordinators only to take name tents printed on a specific color of paper. Ask participants who intend to be facilitators only to take a name tent printed on a different color of paper. Ask participants who intend to be both a facilitator and coordinator to take a name tent printed on a different color of paper. Color selection is up to you as a trainer. This will not only help the participants and you identify who is in the training, but will also assist you in creating small groups that are representative of all of the roles. The remaining name tents printed on the fourth color of paper will be used later in the training for the mock FGDM meeting. Please make sure to return all unused name tents to the Resource Center with your materials so they can be recycled.

On the resource table, place one copy of **Table Resource #1 (Guidelines for Family Group Decision Making in Child Welfare)** and **Table Resource #2 (Pennsylvania Family Group Decision Making Toolkit: A Resource to Guide and Support Best Practice Implementation)**. Note that these items are not specifically referenced in the curriculum. They are only offered as resources for participants to view and for you to tie to the training where you see fit. You may also remind participants that they received a CD at the 207: Introduction to Family Group Decision Making (FGDM): Part I training which contains electronic copies of these documents.

Place two copies of **Appendix #1 (The Values and Beliefs of FGDM)** on each table. These will serve as a reminder of the values and beliefs of FGDM for participants and may be referenced where appropriate during the training.

It will be necessary to hang **Poster #1 (The Four Stages of FGDM)** and **Poster #2 (Stacking for Success)** prior to the start of the training day and fold the posters so that participants are not able to view their content. They will be unfolded during a review from Introduction to Family Group Decision Making (FGDM): Part I. In addition, hang **Poster #3 (The FGDM Meeting)** somewhere in the room where participants can see it. Finally, hang **Poster #4 (The FGDM Meeting Guidelines)** beside the Resource Center training guidelines.

The curriculum is structured to follow the flow of the FGDM process. As such, the first five sections will focus on the role of the coordinator in preparation for the FGDM meeting. The remaining sections will focus on the role of the facilitator. Some participants intend to assume the role of only a coordinator or a facilitator, rather than a coordinator and a facilitator. Inform participants that many of the skills discussed regarding the role of the coordinator are valuable skills for the facilitator to possess and vice versa. It is important that you draw attention to these skills and make connections for participants where applicable.

If you feel comfortable doing so, it may be beneficial to draw parallels between what participants experience during the training day and a real Family Group Decision Making meeting. Several parallels are offered below. Feel free to make any additional parallels throughout the training.

- Your role as a trainer is similar to that of a facilitator. Your job is simply to facilitate the learning process. The FGDM facilitator's role is to facilitate the decision making process. You have likely not met any of the participants, similar to a FGDM facilitator, who in most cases has not met any of the FGDM meeting attendees prior to the meeting.
- The individual, who coordinated participants' attendance at this training, is similar to the FGDM coordinator.
- The concept of guidelines established for the training is similar to the concept of guidelines being established at the FGDM meeting (*e.g.*, the guidelines offered on **Poster #4 (The FGDM Meeting Guidelines)** and asking participants to offer their own guidelines). Guidelines for the meeting/training day are established in the beginning so that expectations are clear.

It is important to keep in mind that there are likely participants in the training who do not work for a public Children and Youth agency. You will likely have participants who work in areas such as Juvenile Probation, Mental Health, Education, Drug and Alcohol, Faith-Based Community, as well as parents and community members. It will be necessary to make connections for these participants. Also, remember that not all participants will be well versed in the jargon and acronyms used by child welfare professionals. It will be important to speak in a language that everyone understands and to take time to clarify certain points and acronyms for these individuals when unfamiliar language is used, not only by you as a trainer, but also by other participants in the training.

At the end of day one, review what participants learned to that point. In addition, ask them if they have any questions about the material. Finally, review the general concepts that participants will hear about in day two.

Step 1: Name Tents
(5 minutes)

Display **PowerPoint Slide #3 (Name Tents)** and, as participants enter the room, ask participants who intend to be coordinators only to take name tents printed on a specific color of paper, participants who intend to be facilitators only to take a name tent printed on a different color of paper, participants who intend to be both a facilitator and coordinator to take a name tent printed on a different color of paper. Color selection is up to you as a trainer. Ask participants to complete their name tents as described on the PowerPoint slide. Inform participants that the purpose of the name tents being assigned as they were is to not only help the participants and you identify who is in the training, but will also assist in creating small groups that are representative of all of the roles.

Tell participants that they will revisit this information shortly.

Step 2: Trainer Introduction
(5 minutes)

Introduce yourself, welcome participants and provide a brief description of your background and experience with Family Group Decision Making (FGDM). Review the guidelines for the Resource Center.

Step 3: Agenda, Competency, and Learning Objectives
(5 minutes)

Review **PowerPoint Slides #4-5 (Agenda)** and **Handout #2 (Agenda)**, **PowerPoint Slide #6 (Competency and Learning Objectives)** and **Handout #3 (Competency and Learning Objectives)** ensuring participant understanding. When reviewing the learning objectives, the parallel can be drawn between the learning objectives and the “Purpose” in FGDM. Ultimately, the purpose of training is to walk away with knowledge and skills outlined by the learning objectives. Also, present the following anticipated outcomes for this training. Offer that they are similar to the bottom-line concerns in an FGDM meeting in that everyone must agree to work towards these items being accomplished prior to leaving.

Trainer Note: Prior to the start of the training, record each of the following bullets listed below on a sheet of flip chart paper and post it near the WIIFM flip chart.

- The individual knows the different roles and phases that are involved in the Family Group Decision Making process and understands which cases are appropriate for FGDM.
- The individual understands the roles and responsibilities of the case manager, coordinator, facilitator, family members, service providers, and others involved in the Family Group Decision Making (FGDM) process.
- The individual is aware of the impact of his/her own values and biases, as well as the family's culture, values, and dynamics on the FGDM meeting.

Step 4: Strengths Small Group Activity
(10 minutes)

Ask participants to break into groups of three. Hang one sheet of blank flip chart paper on the wall near each of the groups and label each Strengths. Participants will use this flip chart paper to tape the 3x5 index cards on which they will capture their strengths during the following activity. Distribute three blank 3x5 index cards to each participant.

Remind participants about the introductions they took part in during Introduction to Family Group Decision Making (FGDM): Part I where they shared an interesting piece of information about themselves with another participant. Tell participants that they are going to take part in a similar activity. During this activity, they should only share information that they are comfortable sharing. If they are not comfortable sharing personal information, they have the option not to participate in this activity. Display **PowerPoint Slide #7 (Strengths Interviews)** and explain that, for those who choose to participate, each participant will take a turn asking one of the other participants to share three strengths about themselves and/or their own family and record each strength on a separate 3X5 index card (*i.e.*, one strength per index card). The third person will observe the interaction between the other two and take note of how the interaction occurs.

Each person will have 2 to 3 minutes to solicit strengths and 2 to 3 minutes to discuss how the activity felt within his or her group. After everyone has had a chance to solicit strengths, ask participants to post the 3X5 index cards with strengths written on them on the flip chart paper labeled Strengths, which should be located on the wall near each small group.

Step 5: Participant Introductions and What's In It For Me?
(10 minutes)

Ask participants to introduce themselves using the information they offered on their name tents (including what they would like to learn from this training, which you should capture on the WIIFM), as well as whether they intend to become a facilitator, coordinator, or both a coordinator and facilitator. In addition, as participants introduce themselves, ask the individual who interviewed the person introducing himself or herself to share the strengths that they captured during their small group exercise.

At the end of the training, review the WIIFM poster and make sure that all of the concerns and questions have been addressed. Reference and use the *Parking Lot* for those items that are not addressed in the training. Explain to participants that the items posted on the *Parking Lot* are not addressed in this training; however, you will attempt to direct them to a resource that can meet their need.

Note that **Handout #4 (Idea Catcher)** has been provided for participants to record thoughts or ideas that they gain from the training so they can take them back to benefit FGDM implementation in their community.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section II: Review of Introduction of Family Group Decision Making (FGDM): Part I

Estimated Length of Time:
15 minutes

Learning Objectives:
Participants will be able to:
- ✓ Recall the four stages of FGDM;
- ✓ Recall the six questions to consider when Stacking for Success; and
- ✓ Recall the parties that are involved in the FGDM process.

Method of Presentation:
Lecture, Large Group Activity

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Appendix #2: Stacking for Success**
- ✓ **Handout #5: The Four Stages of FGDM and Related Roles**
- ✓ **Poster #1: The Four Stages of FGDM**
- ✓ **Poster #2: Stacking for Success**
- ✓ **PowerPoint Slide #8: Review of Introduction of Family Group Decision Making(FGDM): Part I**
- ✓ **PowerPoint Slide #9: Family Group Decision Making (FGDM): Part I Review**
- ✓ **PowerPoint Slide #10: Learning Objectives from Part I – Overview of FGDM**

Section II: Introduction of Family Group Decision Making (FGDM): Part I

Step 1: 207: Family Group Decision Making (FGDM): Part I Review

(10 minutes)

Trainer Note:	**PowerPoint Slide #9 (Family Group Decision Making (FGDM): Part I Review)** has been developed so that the questions will not all be visible upon the initial display of this PowerPoint slide. Because of this, you will need to press one of the buttons that advances a slide to the next slide to display each review question.

Explain that the information in this training builds off what participants learned in Introduction of Family Group Decision Making (FGDM): Part I. Indicate that it is important to begin today's training by briefly reviewing the major points from Introduction of Family Group Decision Making (FGDM): Part I. Display **PowerPoint Slide #9(Family Group Decision Making (FGDM): Part I Review)** and review the following points during the review:

1. What are the stages of FGDM?
    a. Solicit volunteers, however many are needed, until every stage has been identified.
    b. Once all four stages have been identified, unfold **Poster #1 (The Four Stages of FGDM)**, to reveal the four stages of FGDM and indicate to participants that this poster will be posted throughout the training as a visual reminder.
2. Reminding participants that, when considering making a referral for a family to go through the FGDM process, Jim Nice suggests that there are six questions to consider, which he terms "Stacking for Success", ask participants if they can recall the six questions.
    a. Record participant responses on flip chart.
    b. Once all questions are identified, unfold **Poster #2 (Stacking for Success)** to reveal the six questions to consider when "Stacking for Success".

    After reviewing this question, place two copies of **Appendix #2 (Stacking for Success)** on each table and reference throughout the training when appropriate.
3. What parties are involved in the FGDM process? For each identified party, ask participants to offer two to three things for which that party is responsible.
    a. Record participant responses on a sheet of flip chart paper.
    b. Once all roles are identified, distribute **Handout #5 (The Four Stages of FGDM and Related Roles)** and remind participants that they received this

information during Introduction to Family Group Decision Making (FGDM): Part I.

Step 2: Review of Learning Objectives from Part I – Overview of FGDM
(5 minutes)

Display **PowerPoint Slide #10 (Learning Objectives from Part I – Overview of FGDM)** and briefly highlight the major themes of that training day including defining FGDM and its components, the values, beliefs, and benefits of FGDM. Draw attention to **Appendix #1 (The Values and Beliefs of FGDM)**, which is lying at the center of each table. Ask participants if they have any questions stemming from the review of Introduction to Family Group Decision Making (FGDM): Part I. Referencing **Poster #1 (The Four Stages of FGDM)**, again remind participants that, so far, they have only looked at the first stage, which is Referral, in detail and have only taken a high level look at the remaining stages. The purpose of this workshop is to take a deeper look at the remaining stages of the process and more specifically the roles of the coordinator and facilitator.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section III: Preparing for the Meeting: Working with Families

Estimated Length of Time:
3 hours, 20 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the steps in preparing families for a FGDM meeting;
- ✓ State what should be accomplished during the initial meeting with the referral source;
- ✓ State what should be accomplished during the initial meeting with the family;
- ✓ Explain the process of a FGDM meeting to the family;
- ✓ Identify ways to engage children in the FGDM process;
- ✓ Explain the importance of Widening the Circle;
- ✓ Describe tools that are helpful in Widening the Circle;
- ✓ Explain the significance of paternal involvement;
- ✓ Demonstrate how to talk to families about whom to invite to their meeting; and
- ✓ Recognize how family dynamics affect emotional and physical safety.

Method of Presentation:
Lecture, Large Group Discussion, Large Group Activity, Small Group Activity

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Handout #6: Coordinator Checklist**
- ✓ **Handout #7: The FGDM Meeting**
- ✓ **Handout #8: Preparing the Family to Develop a Successful Family Plan**
- ✓ **Handout #9: Tools for Discovering Connections**
- ✓ **Handout #10: Turning the Tables**
- ✓ **Poster #1: The Four Stages of FGDM**
- ✓ **Poster #2: Stacking for Success**
- ✓ **PowerPoint slide #11: Section III: Preparing for the Meeting: Working with Families**
- ✓ **PowerPoint Slide #12: Coordinator's Initial Meeting with the Referral Source**
- ✓ **PowerPoint Slide #13: How to Engage Children**
- ✓ **PowerPoint Slide #14: Tools for Discovering Connections**

Section III: Preparing for the Meeting: Working with Families

Step 1: Coordinator Checklist
(5 minutes)

Distribute **Handout #6 (Coordinator Checklist)** and ask participants to scan the handout. Underscore that coordination is a vital and involved process. Also, note that there are many components of coordination. Refer to **Handout #6 (Coordinator Checklist)**, and explain that this handout can be used as a guide when coordinating a meeting. Inform participants that coordination begins during the initial contact with the referral source and continues throughout the process. The activities in this section will follow the coordination process starting with interviewing skills and closing with an exercise where participants will experience coordination from the family's perspective.

Step 2: Coordinator's Initial Meeting with the Referral Source
(5 minutes)

As participants will see on **Poster #1 (The Four Stages of FGDM)**, the first stage of the FGDM process is Referral and the second stage is Preparation. The coordinator's role begins with a referral to the FGDM process. Typically, the first step for the coordinator is to arrange a time to meet with the referring worker to review information. Display **PowerPoint Slide #12 (Coordinator's Initial Meeting with the Referral Source)**. During this meeting, several things should occur, such as the following:

- Review the information on the referral form
- Clarify the Purpose
- Identify any potential dates for the Pre-Conference meeting and the FGDM meeting
- Widen the Circle
- Discuss any family dynamics that may have an impact on the process
- Explore any safety-related issues
    - Work to ensure the safety of those who will take part in the meeting (especially in cases of domestic violence and/or sexual abuse). Also ensure one's own safety
    - Explore safety issues with all family members (not just the person for whom the meeting is being held)
- Review the Stacking for Success Questions. (**Poster #2 (Stacking for Success)** is available for reference while reviewing the following questions).
    - Are you willing to help the family with the follow up?
    - Are you willing to attend the meeting and consider the family plan?
    - Can the people invited accomplish the purpose?
    - Is the purpose clear and understandable? Does it motivate everyone to attend?

- Is the family voluntarily participating and have they agreed to participate in the FGDM process?
- Do you have hope for the family? Do you believe the family has the ability to come together and be successful in creating a family plan?

It is critical that the referral source be able to answer these questions in the affirmative and honestly for the process to be successful.

Step 3: Coordinator's Initial Meeting with the Family
(10 minutes)

Share that the coordinator's role is to help all involved prepare for a successful family meeting. The initial contact usually occurs with the child, if they are developmentally able, and the primary caregiver of the child. If the child is not living in the home, the coordinator will have to evaluate with whom they will meet and what individuals should be present at the initial meeting. It is recommended, if the coordinator conducts their first meeting with the family in conjunction with the referral source, that the coordinator speak first. This is recommended as the referral source will likely have other items to discuss with the family. This will help avoid the possibility for a negative tone being set for the discussion, but will also allow the coordinator to be viewed in a more neutral light.

Using **Handout #7 (The FGDM Meeting)**, explain that at this initial family contact, the coordinator will make sure that the family has a good understanding of the practice, including the phases of the meeting and whether or not there will be a separate facilitator at the meeting; and may complete any agency paperwork needed to coordinate the meeting. The discussion in this initial meeting includes ensuring voluntary participation in the process, information pertaining to the invitation list, confirming the purpose agreed upon by the family and referral source, choosing the menu, and potential sites and dates for the meeting. It is necessary that the family and referral source are in agreement regarding the purpose of the meeting. This may require that the coordinator help the family and referral source negotiate the purpose. If they are ultimately unable to come to an agreement, a meeting should not be held.

Families may very well have some anxiety about their ability to come together as a family and create a plan that will both be accepted by the referral source and be successful. A family-created plan is likely new to them. As such, they may not be sure what goes into creating a plan that will work. The first meeting is not too early to start talking with the family about what they should begin to think about when they sit down at the meeting to develop their family plan. The better prepared they are, the more likely they are to be successful. Distribute **Handout #8 (Preparing the Family to Develop a Successful Family Plan)** and inform participants that this handout provides coordinators with a list of questions that they can review with families during preparation to get them thinking about how they can develop a plan that has the best chance for success. Review the questions on the handout and ask participants if they can think of any additional considerations that they would suggest to a family. There is space at the end of the handout for participants to record additional ideas.

Step 4: Considering Family Dynamics
(10 minutes)

In preparing the family for a successful meeting, it is important that the coordinator have a discussion with the family regarding how their family dynamics can affect the meeting, including the emotional and physical safety of all participants. Family dynamics include the ways that individuals work together or how a family interacts, communicates, or handles situations in their lives. The coordinator will get whatever background information is needed to understand the family dynamics and to work with participants so that these dynamics do not threaten the safety of any participants. It is the responsibility of the coordinator to assist the family in addressing these dynamics and any family members that could negatively affect the meeting. If extra guidelines or extra preparations are needed to ensure safety, the coordinator and family will address these concerns prior to the meeting. It will be important for the coordinator to share this information with the facilitator, so that they are better prepared for the meeting.

Step 5: Engaging Children
(20 minutes)

Share that the coordinator may have to make numerous contacts with the primary caregiver, the child, and involved family members, ensuring that everyone is prepared for the FGDM meeting. It is very important to stress that although the coordinator will usually work with a parent as the key contact, the voice of the children is very important in this practice. Special attention must be given to ensure that the children understand the practice and they actively participate. Again, it may take some time for the children to develop trust and feel comfortable discussing their concerns and being open. Display **PowerPoint Slide #13 (How to Engage Children)** and, in their table groups, ask participants to discuss the questions on the slide.

When participants have finished, ask each small group to report out the ideas that were discussed. Some examples might include: having children draw pictures, using stuffed animals, puppets, asking the child to write a letter to his/her mother and tell her how much he/she loves her, all the good things (strengths); but also asking what thing he/she feels they need to change to feel safe at home or to make it safe for them to go home.

Step 6: Introduction to Widening the Circle
(5 minutes)

Emphasize that, for the purpose of this training, the identified client is a child. The practice can be generalized in the community to other populations such as the aging population, inmate transition to community, and youth independent living transitions. Discuss the role of the coordinator, referral source, and family members in identifying the invitation list. Initially the referral source works with the family to Widen the Circle of process participants. Often referrals sources are unaware of this role and will require some guidance from the coordinator as they become more familiar with the FGDM process. This list of potential process participants should be provided to the coordinator on the referral form. If necessary, the coordinator then works with the family to further Widen the Circle of participants. The coordinator will assist the family in identifying any resources that could be positive supports and benefit their family meeting.

The family will typically identify their extended family and friends, yet often does not initially realize the number of resources that are available. Whether it is a neighbor, family friend, church member, or grandmother's bingo partner, the coordinator assists the family in "thinking outside the box." It is important that all nuclear family members have an opportunity to identify resources for the guest list. In addition, explain that a critical component to developing the guest list is ensuring that a support person is identified for anybody who may need or want one. In the FGDM process, any persons that participate can have a person to support them during the meeting.

Individuals 16 years or younger, especially those who have been victims of abuse, should be strongly encouraged to have a support person attend the meeting with them. Also in need of support may be any individuals that are in conflict or that may be addressed by numerous participants, such as perpetrators or a parent living out of the home. These support persons will participate as all others, but will have the added responsibility of supporting the family member. This may include identifying the person's need for a break, encouraging, or assisting them in addressing the group, or simply having a hand on their shoulder during difficult times of the meeting.

Trainer Note:	Emphasize that this step probably has the most impact on the success of the family meeting. If the right resources are at the family meeting, the family plan will more likely be comprehensive and effective.

Step 7: Tools for Discovering Connections and Connectedness Mapping Small Group Activity
(1 hour, 25 minutes)

While the FGDM participant list is ultimately up to the family, it is the responsibility of the coordinator to help the family make informed decisions regarding whom to invite to the meeting. When presented with the task of considering whom to invite to a FGDM meeting, caregivers will respond in various ways. These responses can range from very open to considering who will be an asset at the meeting and who will be a critical party, not only to the development of the family plan but also to the implementation of the family plan, to resistant to inviting individuals who may be an asset for various reasons. Ask participants to offer reasons that families may avoid inviting individuals that might be critical to the development and implementation of the family plan. Possible responses could include concerns they have about strained relationships, disagreements, the prospect of embarrassment, *etc.*

Often times, the individuals whom the family does not wish to invite, based on concerns they have about strained relationships, disagreements, the prospect of embarrassment, *etc.*, are some of the most important individuals to invite. Ask participants why they believe this might be the case. Some reasons may include:

- Those individuals can serve as valuable resources, as they can offer financial assistance, provide respite, serve as someone in whom to confide – once new relationships are formed/old relationships are mended, *etc.*
- In casting aside the myth that the apple does not fall far from the tree, we recognize that there are healthy connections in families that have been lost or severed for a variety of potential reasons. If those connections can be reformed, a very strong support may be found.
- Those individuals not invited can potentially sabotage the plan if they were not involved in the plan development and/or if they do not agree with the plan. It is important that everyone who plays a role in the family be involved and bought in to the plan. Even if these individuals do not attend the meeting, they will still interact with the family and have an effect on what happens after the meeting is over.

When reservations arise, it is the role of the coordinator to help focus the family on the child and identify who is important to the child and to the development, implementation, revision (when necessary), and ultimate success of the plan. It is the coordinator's role to help the family see the value of having these individuals at the table. In doing so, it is also critical that the coordinator help identify ways to alleviate any concerns that the family has about these individuals participating. While the coordinator cannot likely fully alleviate the concerns, simply identifying the concerns through meaningful engagement with the family and the case team will prove important. Generally, the use of Shulman Interactional Skills (*i.e.*, Questioning, Reaching for Feedback, Reaching Inside of Silences, Dealing with Issues of Authority, Tuning in to Others, Communicating Information and Identifying Next Steps – all of which should be tempered with a Strengths-Based and Solution-Focused perspective) will assist the coordinator in helping the family identify and plan to address concerns.

Regarding the "Tuning In" skills, the coordinator can help the family to tune in to their own feelings and beliefs as well as the feelings and beliefs of other family members. For example, if the identified child has a significant connection/relationship with a potential FGDM participant and the parent has a strained relationship with that individual, it can be beneficial to help the parent recognize his/her feelings and beliefs about that individual (*i.e.*, Tune in to Self) and consider from where those feelings/beliefs stem. To take it a step further, it can be beneficial to help the parent recognize the importance of that individual to the child (*i.e.*, Tune In To Others). It will then be important to help the parent recognize that, although the other individual's perspectives may be different, the perspectives of that individual are not necessarily wrong, simply different and potentially valuable to the process and the success of the family plan. Again, the invitation list is up to the family, it is simply the coordinator's role to help them make informed decisions. In working with the family to decide whether an individual should participate, it may be discovered that they have a very valid reason to not invite that individual.

Trainer Note:	County agency participants were presented with specific content related to the Shulman Interactional Helping Skills/The Strengths-Based and Solution-Focused perspectives (*i.e.*, what they entail and how to use concepts associated with them) in Module 3 of Charting the Course Towards Permanency for Children in Pennsylvania; therefore, we do not go into specifics here. If participants did not attend Charting the Course and/or are interested in learning more about any of these models and related concepts, direct them to The Skills of Helping Individuals, Families, Groups and Communities (Lawrence Shulman), The Strengths Perspective in Social Work Practice (Dennis Saleeby), and Building Solutions in Child Protective Services (Insoo Kim Berg & Susan Kelley).

If it has been decided that it would be beneficial to invite an individual about whom the family has concerns, the coordinator should help the family explore ways to help alleviate the existing concerns so that all can participate productively. Remind participants of the FGDM guidelines that were discussed during Introduction to *Family Group Decision Making (FGDM): Part I* as well as earlier in this training. The addition of guidelines is one approach to help to alleviate those concerns that a family might have about certain individuals participating. These concerns (in conjunction with the team's suggestion(s) for dealing with the concerns) should be addressed with the FGDM meeting facilitator so that the facilitator is aware of the concerns and can better ensure that the plan is enacted and/or can work with the family during the meeting to address the concerns. Another approach to help alleviate concerns and to help the family member feel safe is to identify a support person for them, as discussed moments ago.

After considering how to work with the family and case team to identify and overcome concerns, in preparation for Widening the Circle, it is important that coordinators are aware of a few tools that will assist them in the effort to discover connections (*i.e.*, Widen the Circle). Display **PowerPoint Slide #14 (Tools for Discovering Connections)**, distribute **Handout #9 (Tools for Discovering Connections)**, and inform participants that the handout contains three tools/approaches to Widening the Circle – all of which stem from the Family Finding model. Reinforce that, in Widening the Circle, they are not only helping the family to identify connections and/or potential FGDM meeting participants but are also helping them see who is important to the child and ultimately to the success of the plan they will develop during the FGDM meeting. Inform participants that there is not enough time to cover in detail all of the tools, so discussion will focus on Connectedness Mapping. Provide participants with a high-level overview of Historical Mobility Mapping, Flow Diagrams, and Connectograms, which are included on pages four through seven of **Handout #9 (Tools for Discovering Connections)**. When providing an overview of Historical Mobility Mapping, it will be important to inform participants that they will need to be very careful when making decisions regarding with which children they use this tool. Historical Mobility Mapping is a very powerful tool, however it can uncover traumatizing information from a child's past. It is important that a coordinator be very familiar with a child and their history before deciding to use this tool. Tell participants that, if they would like to learn more about the other tools, they can attend the Family Finding series offered by the Resource Center.

Draw participant attention to Connectedness Mapping, which is located on pages one through three of **Handout #9 (Tools for Discovering Connections)** and provide them with a detailed overview of Connectedness Mapping. Once you have finished, it will be important that you model this tool/approach for participants. Ask a volunteer to think of a case that would be appropriate for a referral to the FGDM process. Ask them to provide you a brief background of the case. Once the background has been provided, model Connectedness Mapping, making sure to accurately record the Connectedness Map on flip chart paper. Stress that one of the key skills being demonstrated is assisting the family members to identify the guest list without taking over the invitation process. This skill takes balancing multiple things (*e.g.*, egos, feelings, personalities, *etc.*) and practice.

For the following, you will ask participants to break into six small groups. When doing so, ensure, whenever possible, that at least one coordinator is in each group and that the coordinators are distributed evenly among the small groups. Doing so will avoid confusion during the following activity as well as later during a small group activity regarding the Pre-Conference meeting.

For the following activity, individuals are asked to work in their small groups to practice Widening the Circle. One individual is to assume the role of a coordinator. This individual will ideally be the person in the group who will actually coordinate FGDM meetings at their office.

If one group has no coordinator and another has more than one, feel free to send one of the extra coordinators to a group that has no coordinator.

If there are no coordinators in the room, for the benefit of individuals seeing/experiencing the use of the skills involved in Widening the Circle, you should conduct another demonstration on a case identified by participants.

Once participants have an understanding of how to engage a family in Connectedness Mapping and how to complete a Connectedness Map, inform them that they will now have an opportunity to practice Connectedness Mapping. Ask participants to break into no more than six small groups, ideally consisting of approximately four individuals within a small group, as this will allow them to practice the interviewing strategies of the coordinator. Ask participants, in their small groups to discuss cases on their current caseload that they feel are appropriate for referral to the FGDM process. Tell participants, in reviewing their cases, that each small group should decide on one case at their table with which to apply their learning throughout the training. Allow no more than 10 minutes for case selection. When they selected a case, explain that one of the individuals at their table will be responsible for coordination of the FGDM process at their agency will now practice Widening the Circle. It will be necessary for the individual whose case was identified to assume the role of one of the family members to whom the FGDM process was offered. Each small group member will then have the opportunity to observe the process and provide motivational and constructive feedback regarding the coordinator's efforts.

While the individual whose case was chosen will likely walk away with more information about their identified family than they came with, in that they will have been assisted in critically thinking about whom their identified family views as supports/resources and the other participants will not have the opportunity to perform the role of the coordinator, as it pertains to Widening the Circle, they will benefit in other ways. One way in which they benefit is having a deeper understanding of the family's perspective.

Distribute a blank sheet of flip chart paper to each table and tell participants that, during this exercise, it will be necessary for them to create a Connectedness Map. The individuals identified on their Connectedness Maps will be used later during an activity. Participants should post their Connectedness Maps on the wall near their table to reference throughout the remainder of the training. This activity should last approximately 15 minutes. Allow approximately 10 to 12 minutes for participants to conduct their interview. The remainder of the time should be allotted to processing out and feedback.

Trainer Note:	It will be extremely important that you circulate throughout the room to observe each small group and provide additional motivational and constructive feedback, so that participants receive feedback from an expert on the topic.

Bring the group back together and discuss the experience and the strategies discussed in this activity and have participants share their feedback.

This discussion should take approximately 15 minutes.

Step 8: Engaging Fathers
(10 minutes)

Share that while securing the guest list coordinators need to pay particular attention to fathers and paternal relatives. Engaging fathers and their resources is an essential part of Family Group Decision Making. Share that as the coordinator is working with the family to identify resources, it is important to ask each family member if there are others who should be invited. The mother may not give information on the father's whereabouts, but someone else in the family may know. In addition, sometimes, simply searching on the internet can yield a father's location.

Fathers are often excluded due to concerns or circumstances that may not be valid or appropriate reasons for exclusion. Every attempt should be made by the coordinator to determine if the father and his resources can participate in the meeting safely. If a father is denied the opportunity to participate in the FGDM experience, the meeting can be negatively impacted by not having input from these resources.

It should be stressed that even if the father is not able to attend, the paternal resources can still participate in the meeting. It is the responsibility of the coordinator to address these concerns and to exhaust all opportunities for the father and his resources to participate in the FGDM process. If the father is unavailable or in prison, the coordinator can get his written views, interview him or have a teleconference set up to have his voice heard. Some counties have video or audio taped a father so that his voice is heard at his family's meeting. The coordinator may have to spend extra time coordinating a meeting with these circumstances, especially if the resource is not actively involved in the child's life or has a hostile relationship with the family. These techniques work for either parent who is incarcerated or otherwise physically unavailable for the meeting.

Step 9: Considering Safety
(10 minutes)

Explain that an additional consideration for the coordinator during family preparation is how the process addresses safety issues and ensures the emotional and physical safety of all participants. It is recommended that a county <u>not accept</u> domestic violence or sexual abuse cases for the first year or until they have both experience in FGDM meetings and advanced training to work with these cases. It is further recommended that counties develop a safety committee that guides policy and may assist in reviewing referrals for meetings.

These cases add an extra dynamic to the experience that can be difficult to handle and should be addressed with great sensitivity and caution. Many counties have an instrument or information gathering tool to screen out these cases in the beginning of implementation. These meetings often take more time and effort to coordinate to ensure that plans for safety are in place for the meeting.

Trainer Note:	One recommendation is for each county to have a Safety Subcommittee of the FGDM Implementation Team made up of community members that are highly involved in these areas of the community (*i.e.*, sexual abuse counselors, crisis service counselors, and domestic violence counselors). Cases can be presented to this committee to address safety concerns and to make sure that the case is appropriate for the FGDM process.

Share that the coordinator will meet with family members to determine if they have safety concerns or feel that they will not be able to participate because they are scared or uncomfortable. If concerns arise, the coordinator may use other methods to ensure that views are heard without individuals being put at risk (*e.g.*, having other participants address difficult issues or having support person share a written statement).

The coordinator will also make sure that the family has the resources to ensure that safety issues are addressed after the FGDM meeting. If a coordinator determines that holding a FGDM meeting could jeopardize the safety of family members, then the coordinator will recommend to the family and referral source that there not be a meeting. If the family does not feel safe with a particular participant at the meeting and all other options have been exhausted to ensure safety, this person may be excluded from the meeting. Excluding participants is very rare and should be a last resort after all other options are exhausted. Explain that a FGDM meeting should not be held in place of criminal charges being filed.

Step 10: Considering Culture
(5 minutes)

Share that once the guest list is secured, the coordinator must address how FGDM fits with the family's culture. Stress that FGDM respects the family's culture by recognizing that each family has a unique culture in which they live and function. A coordinator should attempt to tailor the FGDM experience to this as much as possible by having the family start and end their meeting with a family tradition. This could be a prayer, a song, a greeting from an elder or other family member, or a child sharing a drawing. In addition, the family decides the location of the meeting and the food served at their meeting to further ensure the family's comforts.

Step 11: Efforts to Contact All Participants
(5 minutes)

Share that up to the point of the actual meeting and sometimes on the day of the meeting, the coordinator is making every effort to contact all persons listed on the family's guest list in person or on the telephone. Emphasize that face-to-face meetings are recommended for those deemed to have an important role in the family or for individuals that are identified by the family to address specific concerns.

Step 12: Turning the Tables
(15 minutes)

Explain that, up to this point in the training, the focus has been on participants being in the role of the referral source and the coordinator. In order for participants to understand the impact of the referral source and the coordinator on the family, participants will have the opportunity to experience having their own family offered a FGDM meeting by participating in an activity called "Turning the Tables". The exercise is adapted from Jennifer Baker, Lifetrack Resources / Family Group Decision Making Program, St. Paul, MN. The purpose of the exercise is for participants to reflect on what it would feel like to have their own family coordinated for a Family Group Decision Making meeting. Participants will face some of the difficult experiences that families go through, as well as some of the challenges that each family brings to the FGDM meeting. There is a handout for this exercise with general questions that are asked of families who are planning to participate in a FGDM meeting. This reflective exercise will give participants the opportunity to see what the process is like from the family's point of view and give them an appreciation of some of the difficulties families face during this process.

Trainer Note:	For the following, if you are comfortable doing so, complete **Handout #10 (Turning the Tables)** ahead of time – offering a topic area that pertains to you or someone in your family. In explaining the instructions on the handout, offer your responses to participants.

Distribute **Handout #10 (Turning the Tables)** and explain the instructions at the top of page one. Tell participants that the handout will ask them to offer some very personal information. Offering this personal information will assist participants in gaining a better understanding of the family's perspective as the family moves through the Preparation Phase of FGDM.

Tell participants that they should work individually to complete the handout. In addition, tell them that the information is extremely personal and is something that they will not have to offer others. As such, they should be very honest in their responses on the handout. Ask participants to select one of the five categories on the first page of the handout that pertains to either the participant or someone in their family. The categories on the handout are as follows:

- Drug Choice
- Relationship Issues or Concerns
- Mental Health
- Difficult Circumstances
- Specific Events causing involvement

If the categories offered at the top of the handout do not apply to a participant's family, they can create a category more relevant to them or their family.

After identifying a category, using **Handout #10 (Turning the Tables)**, ask participants to complete the questions individually. Encourage participants to try to depict themselves and/or their families as closely as possible during this exercise. Completing the questions should take roughly 15 minutes. The purpose of completing the questions, in addition to the global concept of experiencing what the family experiences as they move through the Preparation Phase, is to have the participants understand the difficulties and struggles the family may face during the FGDM experience.

Trainer Note:	If any of the participants finish the handout early, ensure that participants are aware that they should remain silent so that others may complete the handout without being disturbed.

Step 13: Tuning In
(15 minutes)

Trainer Note:	There may be instances in which participants took part in a Family Group Decision Making meeting as a part of their personal lives and not as part of their professional lives. If such a situation exists in your training, feel free to ask that participant/those participants to share their

experiences, as doing so will help participants understand how empowering and simultaneously difficult the FGDM process can be.

As a large group, ask participants to use the Shulman Interactional Helping Skill of Tuning-In to Self to think how this information affected them. Ask participants to share their global experiences with this exercise (*i.e.*, was it comfortable thinking about and disclosing this information, after thinking more critically about issues their family faces and who they would want involved in solution-finding, did they learn anything new about themselves or their families, *etc.*). In processing out the considerations, emphasize that participants do not have to share anything they do not feel comfortable sharing. Now, ask participants to use the Shulman Interactional Helping Skill of Tuning-In to Others and consider how the feelings they felt transfer to the family. One example might be, if a participant would not want his/her uncle to attend a FGDM meeting, why is this any different for a child/youth when we tell the child/youth that his/her uncle has to attend the meeting despite existing strong feelings that the uncle should not be there? Ask participants how being aware of these internal conflicts can be better handled when using the skill of Tuning-In to Others (*e.g.*, participants can help the youth in this scenario see the value in having his/her uncle attend – when appropriate – versus simply saying, “Your uncle has to attend and that’s all there is to it.”)

Discussions could take approximately 15 minutes.

Section IV: Preparing for the Meeting: The Delicate Balance of Coordinating

Estimated Length of Time:
45 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify challenges associated with coordinating the FGDM process.

Method of Presentation:
Lecture, Large Group Discussions

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Handout #11: The Delicate Balance of Coordinating**
- ✓ **PowerPoint Slide #15: Preparing for the Meeting: The Delicate Balance of Coordinating**
- ✓ **PowerPoint Slide #16: The Delicate Balance of Coordinating**

Section IV: Preparing for the Meeting: The Delicate Balance of Coordinating

Step 1: The Delicate Balance of Coordinating
(15 minutes)

Begin the discussion by reminding participants that, to this point, the training has explored how to Widen the Circle to include more family members as well as turning the tables to get a sense of how it would feel to be asked questions about their family. Note that the discussion will shift focus to the difficulties that a coordinator may face in balancing their various roles and responsibilities.

Trainer Note:	Limit discussion in the step to 10 minutes, as participants will have the opportunity to apply the concepts to actual cases and process them out, following the discussion.

Display **PowerPoint Slide #16 (The Delicate Balance of Coordinating)**, which offers global categories to consider when thinking about the delicate balance of coordinating. Ask participants to offer, based on the categories they see, some of the concepts that FGDM coordinators need to balance when coordinating meetings.

After the large group offers input, distribute **Handout #11 (The Delicate Balance of Coordinating)** and reinforce some of the paradoxical stands that the coordinator is required to maintain throughout the FGDM process. Ask if participants have any thoughts or feedback on this step and if they have any thoughts on how a coordinator can successfully navigate this difficult task.

Step 2: Considering the Delicate Balance of Coordinating as it Relates to Real Cases
(30 minutes)

Explain that later in the training, participants will have the opportunity to participate in a mock FGDM meeting that will be based on one of the case scenarios identified by the small groups during the Widening the Circle activity. As such, it will be necessary to begin to consider which case scenario will be used for the mock FGDM meeting. At this time, you will narrow the options down to two to three possible case scenarios. Ask each small group to provide a brief synopsis of the case that they worked on during the Widening the Circle activity. After participants have heard all of the scenarios, ask them to choose the two to three cases that they believe would be the most difficult to coordinate.

Tell participants that, as a large group, they will now consider challenges that may be faced in each of these scenarios, as well as how one might deal with those challenges. This will give participants the opportunity to not only apply some of the concepts just discussed to actual cases, but will also provide a valuable opportunity for the participants who are working with those families to think critically about and discuss the challenges that may be faced.

Process out each of the chosen cases by asking the large group what challenges may be faced and how they would manage those challenges based on discussions held surrounding **Handout #11 (The Delicate Balance of Coordinating)**. If participants offered a constructive method of handling the issue, recognize their good work. If they offer a method that you believe would not work or they offer no method to handle the issue, offer feedback regarding how to handle the issue.

When all of the chosen scenarios have been discussed, share examples with the large group about struggles you experienced while coordinating. Give the group an opportunity to identify how they might have handled that situation. Afterward, share how you would handle the situation.

Following the large group discussion, ask participants if they have any questions regarding the balancing act that a coordinator experiences.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section V: Preparing for the Meeting: Working with Service Providers

Estimated Length of Time:
1 hour, 50 minutes

Learning Objectives:
Participants will be able to:
- ✓ Create a purpose statement;
- ✓ Identify the importance of preparing service providers;
- ✓ Describe the role of a service provider;
- ✓ Identify the critical elements of conducting a FGDM Pre-Conference meeting for service providers; and
- ✓ Demonstrate how to facilitate a FGDM Pre-Conference meeting.

Method of Presentation:
Lecture, Large Group Activity, Small Group Activity, Large Group Discussion

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Handout #12: Pre-Conference**
- ✓ **Handout #13: Service Provider Responsibilities**
- ✓ **Handout #14: Facilitator Checklist**
- ✓ **PowerPoint Slide #17: Section V: Preparing for the Meeting: Working with the Service Provider**
- ✓ **PowerPoint Slide #18: A Good Purpose Statement…**
- ✓ **PowerPoint Slide #19: Pre-Conference**
- ✓ **PowerPoint Slide #20: Service Provider Responsibilities**

Section V: Preparing for the Meeting: Working with Service Providers

Step 1: Mock FGDM Meeting Case Selection
(5 minutes)

Tell participants that they will be conducting a mock FGDM meeting later in the training. At this time, it will be necessary to identify one case on which to conduct the FGDM meeting. The reason it is necessary to choose one case at this time is that discussions and activities that occur throughout the remainder of the training will be based on the selected case. These discussions and activities will ultimately lead up to the mock FGDM meeting.

Trainer Note:	For the following, ensure that participants choose a case that has enough roles to assign to as many participants as possible. If there are too many roles identified, focus assigning roles primarily using family members rather than service providers.

Ask participants to choose one of the cases just discussed during the Delicate Balance of Coordinating exercises – as all participants will be familiar with those cases. Use this case throughout the remainder of the training.

Step 2: Identifying Roles for the Mock FGDM Meeting
(20 minutes)

After participants have identified a case on which to work, they will need to identify all parties that will be involved in the FGDM process – including the co-facilitator, family members/supports, and service providers. Identification of roles is necessary, as each participant will be assigned one of these roles and knowledge regarding who assumed which role will prove crucial, as individuals must know the background information associated with their respective role to take part in activities and ultimately the mock FGDM meeting.

Tell participants that, as they identify the individuals involved in the case (in order to assist in identifying and remembering the roles of all involved), you will create a genogram, which offers the name of the person and their role in the process. Be certain to place the genogram in a location that is visible to all participants. Explain to participants that you will assume the role of the facilitator. The remaining roles should have been identified and recorded during the Widening the Circle activity, with the exception of the service providers and co-facilitator. At this time, assign a role to each participant, making sure to keep the number of service providers/professionals to a minimum. Distribute the name tents printed on the unused color of paper to each participant and inform them that they should write their identified role on this name tent, as they will assume this role during activities throughout the remainder of the training. As roles are assigned, it will be beneficial for the participant whose case was chosen to offer information on each of the family members so that roles are more accurately portrayed. This information should also be recorded on participants' newly assigned name tents so that it is not forgotten. This should not take long and should be general information surrounding each individuals role in the family, personality, temperament, feelings about the situation, *etc.*

Trainer Note:	Another option is available for providing information to participants about the role they will be playing. You may choose to provide index cards to the participant whose case was selected for the mock FGDM meeting and ask them to take the index cards home that evening and write each FGDM meeting participants name on a separate index card with a couple of sentences about that individual. Distribute the index cards the following day to the appropriate individuals.

Tell participants that they will not be assuming their roles at this point, but will do so shortly.

Step 3: Identifying a Purpose Statement for the Mock FGDM Meeting
(10 minutes)

For purposes of this training, once the large group has come to a consensus regarding the roles of the individuals involved in the case, it will be necessary to identify a purpose for the FGDM meeting. Facilitate large group efforts to create a purpose statement. Display **PowerPoint Slide #18 (A Good Purpose Statement…)** and tell participants that they should be familiar with this PowerPoint slide from Introduction to Family Group Decision Making (FGDM): Part I. This PowerPoint slide should be used in their efforts to develop the purpose statement. The purpose statement should be written on a sheet of flip chart paper and posted beside the genograms, for the remainder of the training.

Step 4: Pre-Conference
(15 minutes)

Explain that once a coordinator has determined that there are enough family resources who plan to attend the meeting, the coordinator typically schedules a Pre-Conference meeting with the identified service providers. Using **PowerPoint Slide #19 (Pre-Conference)** and **Handout #12 (Pre-Conference)**, explain that a Pre-Conference meeting is held prior to the FGDM meeting between the coordinator and the service providers and county agencies to discuss the purpose of the meeting, review the roles of each participant, and identify strengths, concerns, and resources. The service providers will be educated on the paradigm shift to ensure they understand that this is a family meeting not an agency meeting. Explain that the Pre-Conference meeting may look different depending on the county. In some counties, the referral source participates in the Pre-Conference meeting with the service providers and shares the Bottom-Line Concerns. In other counties, a separate meeting is held with the referral source to finalize Bottom-Line Concerns and reconfirm their commitment to support the family's plan.

Step 5: Service Provider Responsibilities
(10 minutes)

Review **PowerPoint Slide #20 (Service Provider Responsibilities)** and **Handout #13 (Service Provider Responsibilities)** and discuss the responsibilities of the service providers/county agencies at the FGDM meeting by emphasizing the following key points:

- The most important requirement is to remain positive and to avoid taking over the meeting
- Use “family friendly” language, not clinical terms, acronyms, and abbreviations that the family will not understand
- Show respect for the family by making sure they understand the input being provided. A common way of showing disrespect is when service providers share information with colleagues (whispering) during a meeting
- Share the strengths, concerns, and resources, as well as what their agency provides and other community resources
- Respect confidentiality by not discussing information shared at the meeting outside of the meeting
- Be willing to support the family plan
- If providers stay during the meeting, they will not be included in Private Family Time and will wait outside the room until the family has concluded their decision-making
- Recalling Part I of the FGDM training, although not something written on the guidelines for the meeting, it is important to keep in mind that any child welfare professionals in the room should not take notes during the FGDM meeting

During the meeting, you may choose to have a copy of the FGDM values and beliefs on the table for attendees to review, as this may help to get them in the right frame of mind. In addition to helping to get attendees in the right frame of mind, they can also be referenced throughout the meeting if focus is lost.

Step 6: Bottom-Line Concerns
(5 minutes)

Referring back to the large group’s identified case; explain that the final portion of the Pre-Conference meeting is to solidify the Bottom-Line Concerns with the referral source. Have participants generate potential Bottom-Line Concerns related to safety, permanency, and well-being that a child welfare professional would use with this family. Record their responses on flip chart paper to be used in the mock FGDM meeting. Ensure that the Bottom-Line Concerns are relevant to the purpose and to safety, permanency, and well-being.

Step 7: Modeling Facilitation of a Pre-Conference Meeting
(15 minutes)

Trainer Note:	Another option for delivery exists in this step if some participants coordinated and/or attended Pre-Conference meetings. The other option is to ask the person who coordinated a meeting to assume the role of coordinator. If using this option, you would allow the coordinator to run a Pre-Conference meeting as they normally would (staying as true to life as possible) and then ask the large group to offer feedback on what they see. In conjunction with participant feedback, you would then offer motivational and constructive feedback on what you saw. When appropriate, you could also offer immediate feedback during the Pre-Conference meeting.

Tell participants that they will now see a mock Pre-Conference meeting modeled for them based on the case chosen by the large group. Seeing a Pre-Conference meeting modeled for them will allow coordinators to see in action the skills needed to conduct a Pre-Conference meeting effectively.

After explaining the purpose of the exercise, explain how the activity will be conducted. Do the following:

- Tell participants that you will play the role of the coordinator
- Ask the individual whose case was chosen by the large group to play themselves (*i.e.*, the referral source)
- Ask those originally assigned the role of service providers in the case identified by the large group to assume the role of providers in this exercise
    - Ask one of the "providers" to take a somewhat adversarial stance, as times may arise when individuals involved in the meeting may not see the value in a family taking part in the FGDM process. In these instances, it will be necessary for a coordinator to evaluate and consider the concerns expressed and weigh them against the benefits of the family engaging in the FGDM process. Seeing this adversarial stance allows participants to observe the delicate balance of coordinating in action

Playing the role of the coordinator, guide the volunteers through a mock Pre-Conference meeting. Prompt service providers (and other volunteers) to ask questions that they think a provider might ask at a Pre-Conference meeting.

Process out with the larger group what participants observed and whether they have any questions.

Step 8: Mock Pre-Conference Meeting
(20 minutes)

Trainer Note:	For the following activity, individuals will work in their original small groups to conduct a mock Pre-Conference meeting. One individual is to assume the role of a coordinator. This individual will ideally be a person who will actually coordinate FGDM meetings. If one group has no coordinator and another has more than one, feel free to send one of the extra coordinators to a group that has no coordinator. If there are no coordinators in the room, for the benefit of individuals who will sit through Pre-Conference meetings, you should facilitate one other mock Pre-Conference meeting based on a case identified in one of the other small groups.

Tell participants that, now having seen a Pre-Conference meeting modeled, they are ready to try to hold a mock Pre-Conference meeting. Divide participants into their original small groups of approximately four to simulate a FGDM Pre-Conference meeting. Their work should be based upon the original case they identified in their small groups. Instruct each group to identify the individual(s) who plans to coordinate FGDM meetings, as this person will be the only individual who will play the role of the coordinator. Vary the roles as is necessary, ensuring that only actual coordinators serve in the role of coordinator.

In addition to the coordinator, groups are to identify a referral source and to assign roles of service providers to the other group members. Tell participants that they are to participate actively in the meeting by asking questions and contribute to the role-play.

Show **PowerPoint Slide #19 (Pre-Conference)** and tell participants that they are to use **Handout #12 (Pre-Conference)** as a basis for the feedback they will offer after completing the exercise. These items also serve as a reminder of the areas that should be discussed at the Pre-Conference meeting. Prior to anyone giving feedback, the “coordinator” is to critique her/himself. After s/he has done so, other members of the group are to give motivational and constructive feedback about the coordinator’s delivery and style.

Trainer Note:	It will be extremely important that you circulate throughout the room to observe each small group and provide additional motivational and constructive feedback, so that participants receive feedback from an expert on the topic.

Step 9: Sharing of Information between Coordinator and Facilitator
(10 minutes)

Summarize by stating that, to this point, participants have explored the coordination of FGDM. Solicit overall feedback from participants on the aspects of coordination. Additionally, stress that it is important for coordinators to always consider the safety of the child and family members. It may be necessary to postpone a FGDM meeting and continue coordination with the family to make sure safety can be ensured.
Shift the discussion from how to prepare agency representatives to sharing information with the facilitator. Explain that the coordinator also meets with the facilitator and potentially the co-facilitator prior to the meeting. Communicate that in some counties the coordinator and facilitator are separate individuals and stress that it is helpful to provide the facilitator with some of the background information that the coordinator has gathered about the family. The information shared is intended to help the facilitator understand the dynamics that are occurring within the family, as these dynamics will influence facilitation efforts. Stress, however, that the information the facilitator receives should not affect their neutrality during the meeting.

Share that the coordinator describes dynamics, things to consider or red flags regarding the children or other participants that the facilitator should consider (*i.e.*, “This family resorts to yelling very quickly” or “mother’s past addiction is a sore spot and an underlying issue that may come up and this is how the family would like to address it…”). Also, share that counties use various methods of transferring coordinator information to the facilitator. Reference **Handout #14 (Facilitator Checklist)**, and explain that this checklist is a useful guide for coordinators for information transfer. Suggest that coordinators share a completed checklist with their facilitator.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section VI: The Meeting: Phase I & Phase II

Estimated Length of Time:
2 hour, 20 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the steps in facilitating Phase I and Phase II of a FGDM meeting;
- ✓ Recognize the importance of the introduction in setting the tone for a FGDM meeting;
- ✓ Recognize how group dynamics impact a FGDM meeting;
- ✓ Identify the key components of the Information Sharing phase;
- ✓ Clarify Bottom-Line Concerns;
- ✓ Identify ways to solicit underlying concerns;
- ✓ Identify challenges that may arise during facilitation;
- ✓ Identify solutions to addressing challenges that may arise during facilitation; and
- ✓ Identify markers of effective facilitation.

Method of Presentation:
Lecture, Video, Large Group Discussion, Small Group Activity

Materials Needed:
- ✓ DVD Player/TV
- ✓ External Speakers (for Laptop)
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Appendix 3: Snyder Family Scenario**
- ✓ **Appendix 4: Martin Family Scenario**
- ✓ **Appendix 5: Herr Family Scenario**
- ✓ ***DVD: FGDM Mock Conference***
- ✓ **Handout #5: The Four Stages of FGDM and Related Roles** (revisited)
- ✓ **Handout #14: Facilitator Checklist** (revisited)
- ✓ **Handout #15: The FGDM Meeting Guidelines**
- ✓ **Handout #16: Concerns Under the Concerns**
- ✓ **Handout #17: Group Dynamics and Facilitation**
- ✓ **PowerPoint Slide #21: Section VI: The Meeting: Phase I & Phase II**
- ✓ **PowerPoint Slide #22: Phase 1: Welcome & Introductions**
- ✓ **PowerPoint Slide #23: Phase 2: Information Sharing**
- ✓ **PowerPoint Slide #24: Underlying Concerns**
- ✓ **Poster #1: The Four Stages of FGDM**

207: Introduction to Family Group Decision Making (FGDM): Part II

- ✓ **Poster #2: Stacking for Success**
- ✓ **Poster #3: The FGDM Meeting**
- ✓ **Poster #4: The FGDM Meeting Guidelines**

Section VI: The Meeting: Phase I & Phase II

Trainer Note:	Throughout the facilitator portion of the training, you will be discussing skills that are not unique to the role of the facilitator. Many of these skills also apply to the role of the coordinator. It will be important to stress this so that participants who intend to be coordinators also pay close attention, as there is much for them to learn during this section. Make sure to draw attention to these skills and make the connections where applicable. Throughout this section, you may ask participants to reference **Handout #14 (Facilitator Checklist)** (revisited) at appropriate times.

Step 1: Shifting Focus from the Coordinator to the Facilitator
(5 minutes)

Begin the discussion for this section by stating that the focus will now shift from coordination to facilitation. Remind participants that in some counties, the coordinator and facilitator may be the same person while, in other counties, they may not be the same person. Referencing **Poster #1 (The Four Stages of FGDM)**, reiterate that there are four stages to FGDM: Referral, Preparation, the FGDM meeting, and Follow-Up. Note that the third stage will now be considered. Participants should recall from Introduction to Family Group Decision Making (FGDM): Part I that the third stage has four phases (Welcome & Introductions, Information Sharing, Private Family Time, and Presentation of Family Plan and Acceptance). Referencing **Poster #2 (The FGDM Meeting)**, explain that the four separate phases are extensive and can last on average four to five hours. State that this section concentrates on Phase 1 (Welcome & Introductions) and Phase 2 (Information Sharing).

Trainer Note:	Reiterate that in some counties, the coordinator actually facilitates the meeting, but for the purposes of this training, the coordinator will not be the facilitator.

Step 2: Phase 1: Welcome & Introductions: Facilitator and Co-Facilitator Introductions
(10 minutes)

Reference **Poster #3 (The FGDM Meeting)** and review the phases of the FGDM process ensuring that you tell participants that these are the phases that participants learned in Introduction to Family Group Decision Making (FGDM) Part I.

Display **PowerPoint Slide #22 (Phase 1: Welcome & Introductions)** and share that this phase usually begins with facilitator introducing her/himself and the co-facilitator and welcoming everyone to the meeting. The facilitator, on behalf of the family, should thank all the participants for coming. The facilitator should introduce their role in terms of maintaining neutrality and staying focused on the purpose.

Share that the role of the co-facilitator is to document what is said at the meeting.
It should be addressed that if the co-facilitator does not write down exactly what is said or meant, the members should feel comfortable to correct this right away.
Mention to participants that a more extensive list of the roles of all involved is provided on **Handout #5 (The Four Stages of FGDM and Related Roles)** (revisited). They may recall the same information being offered in Introduction to Family Group Decision Making (FGDM): Part I.

From the beginning, the facilitator should acknowledge that some of the content of the meeting may be difficult and should acknowledge the commitment and sacrifice of people taking part in the meeting.

Step 3: Phase 1: Welcome & Introductions: Purpose
(5 minutes)

It is at this time that the purpose of the meeting is stated. Prior to moving on, individual agreement surrounding the purpose of the meeting should be received from each participant at the meeting. This can be accomplished in a variety of ways such as seeing everyone nod their heads or say "yes," *etc.* If not all agree, the facilitator must explore and revise the purpose, if necessary, so that all participants can agree on the purpose. If the participant is not a critical family member, they can agree to disagree or the facilitator will allow them to leave.

Share that the role of the facilitator is to guide the process. In doing so, they are to get a commitment from the referral source that they are willing to support the family plan if it adequately addresses concerns and the family to stay and take as much time as necessary to create the family plan.

Step 4: Phase 1: Welcome & Introductions: Guidelines
(5 minutes)

Stress that once the purpose is agreed upon and a commitment has been received, it is important to establish a positive and safe climate for discussion. Inform training participants that, to accomplish this, the facilitator should review the guidelines for the meeting and gain consensus from the family.

Using **Poster #4 (The FGDM Meeting Guidelines)**, hung beside the Resource Center training guidelines, and **Handout #15 (The FGDM Meeting Guidelines)**, review the content of the handout and demonstrate how one might discuss the guidelines with the family during the meeting. Make sure to review confidentiality and the role of mandated reporters and the need to ask all mandated reporters in the room to identify themselves. Also, note that, after the guidelines are agreed upon, the family should be asked if they would like to include any additional guidelines, specific to their family.

Step 5: Phase 1: Welcome & Introductions: House Keeping and Family Ritual
(5 minutes)

At this time, if there is an observer present, ask for permission from family for the observer to be present. Explain that they will not be commenting, questioning, taking notes or participating in Private Family Time. If everyone is not in agreement for the observer to stay, he/she will have to leave.

Next, you should pass out a tablet for participants to sign their name and address if they want a copy of the typed plan.

Also, pass out family evaluation forms. Indicate to the family that the evaluations are confidential, and they can fill out these forms throughout the course of the meeting and hand them in at the end.

Share that this is the time of the meeting for the family ritual that was chosen by the family. Reiterate that by starting the meeting with a family ritual, the meeting is afforded the “feeling” of a family get together instead of a professional meeting. Sometimes this may be a prayer, a song, a drawing, or a statement from a family member. Provide examples from experience of family traditions/rituals. Share the impact that that tradition/ritual had on the family.

Following the family tradition/ritual, ask participants to introduce themselves and their relationship to the identified child.

Step 6: Phase 1: Welcome & Introductions: FGDM Mock Conference Video Clip: Introductions
(20 minutes)

Inform participants that they are now going to watch a video that offers a depiction of the portions of a FGDM meeting that they have discussed to this point. Ask participants, when watching the video, to consider whether the video is consistent with their learning surrounding Phase I of the FGDM meeting. Ask them to also consider what they think was done well that they would like to emulate, as facilitators. Also, what they think could have been done differently.

Show the “Introductions” clip from the ***DVD: FGDM Mock Conference***, which is approximately 8 minutes in length. After showing the video, process out with participants regarding what was consistent with their learning regarding the first phase of a FGDM meeting. Also, ask participants what they believed to be done well that they would like to emulate and what they think could have been done differently.

Step 7: Phase 2: Information Sharing: Referral Source Case Presentation and Strengths
(20 minutes)

Display **PowerPoint Slide #23 (Phase 2: Information Sharing)** and inform participants that they are now ready to move into the second phase of the FGDM meeting. Explain that this phase will begin with the facilitator asking the referral source to present the case, as it relates to the purpose.

After the referral source has presented the case, the meeting will proceed with the documentation of the strengths. Strengths can be a positive attribute, something that the family or individual is doing well or anything positive that they would like to share about the family. Remind participants of the introductory exercise where participants identified their own strengths to underscore both how powerful strengths are and how hard it can be for some people to identify their strengths.

Tell participants that, when facilitating the discussion of strengths during the meeting, the facilitator can prompt participants by asking any of the following questions:

- What is going well with the family?
- What are you most proud of pertaining to your family?

Throughout the discussion of strengths, the co-facilitator will write down the responses on flip charts and do what they can to link the strengths of different participants. This can be done simply by writing the person's name next to their strengths. Note that the co-facilitator should write exactly what the person says. They may even repeat comments back to get confirmation and to ensure they are saying what they mean. The facilitator and the co-facilitator will have to work out a form of communication that will identify when the co-facilitator needs more time to document the content of the meeting. This is a monitoring skill that the facilitator will have to develop that will assist the co-facilitator and make sure the meeting runs smoothly.

If not prepared, families can sometimes struggle to get started identifying strengths. An option to avoid this exists during preparation. It can be beneficial for the coordinator to help the family identify strengths in advance of the meeting and ask them to write those strengths down and bring them to the meeting. The coordinator may also choose to record the strengths, bring them to the meeting, and distribute them to the person who identified them. In addition to avoiding a situation in which families struggle to identify strengths in the meeting, another benefit is that less time is spent in the beginning of the meeting, allowing families more time and energy to create their family plan during Private Family Time. The same approach can be taken when identifying concerns, which will be discussed shortly.

It may also be beneficial for the coordinator to identify a family member to "get the ball rolling". The responsibility can be assigned to a specific family member to begin offering strengths. It is important that the sharing of strengths not feel like a struggle. It must be a positive experience, as the strengths are the basis from which the concerns will be addressed. If the family struggles to identify strengths, they can feel defeated from the beginning.

Show the "Strengths" clip from the ***DVD: FGDM Mock Conference***, which is approximately 5 minutes in length. After viewing the "Strengths" clip, as a large group, ask participants to discuss what they observed and whether they would address strengths in a similar or different manner.

Step 8: **Phase 2: Information Sharing: Concerns**
(20 minutes)

Again display **PowerPoint Slide #23 (Phase 2: Information Sharing)** and inform participants that you will now shift the discussion to the concerns that FGDM meeting participants have. Underscore that the concerns will create the content of what the family plan will look like. Note that prior to the discussion of concerns, it is often helpful to reference the guidelines established by the family for the meeting to ensure that participants present concerns in a respectful way. Refer to **Poster #4 (The FGDM Meeting Guidelines)** as a guide. Note that the facilitator should do what they can to link the concerns of different participants. As with strengths, the co-facilitator may simply record the name as they are scribing. Offer the following example of a question that a facilitator can ask: what are you worried about related to the purpose? Note that the facilitator should ensure that everyone has a chance to participate during the discussion of both strengths and concerns.

Show the "Concerns" clip from the ***DVD: FGDM Mock Conference***, which is approximately 10 minutes, 30 seconds in length. After viewing the "Concerns" clip, as a large group, ask participants to discuss what they observed and whether they would address concerns in a similar or different manner.

Step 9: Underlying Concerns
(40 minutes)

Trainer Note:	For the following activity, it is critical that you sit with each small group briefly to see how they are doing. It may be necessary to redirect some of the questioning and further model this skill. The instructions refer to the facilitator indentifying the concerns under the concerns; however, use of this skill is equally critical for the coordinators. As such, do not limit the skill practice to facilitators. Allow all participants the opportunity to practice this skill.

Explain that looking for the underlying concern is a critical skill that a facilitator must have. Display the questions found on **PowerPoint Slide #24 (Underlying Concerns)** and review **Handout #16 (UnderlyingConcerns)**. After reviewing the handout, model this skill using one of the small groups' scenarios that is not being used for the mock FGDM meeting. Ask participants whether they have any questions. Ask participants whether they would like to add any questions that they believe might be/are effective. Process out accordingly.

Tell participants that they are going to have an opportunity to practice discovering the concerns of the family. Divide the participants into small groups of four and have one participant in the group act as the facilitator, one as an observer and the rest in the group as family members. Assign each small group one of the case scenarios associated with **Appendix #3 (Snyder Family Scenario)**, **Appendix #4 (Martin Family Scenario)**, and **Appendix #5 (Herr Family Scenario)**.

Instruct the small group facilitators to ask the other participants to share concerns. Also ask the facilitators to seek the concerns beneath the concerns throughout the small group discussion. If small groups need additional direction, provide the example of anger issues. For instance, if a family member states that they are worried about anger issues and are asked, "What concerns you about the anger?", this could help identify the concern for the safety of a younger sibling or the influence on this younger sibling. Either way, it identifies the concern under the concern and gets closer to the heart of the issues that need to be addressed.

Instruct the small groups to spend 5 minutes identifying concerns and 2 minutes discussing what went well and other feedback. Then inform participants that after the first 7 minutes, the small groups should change roles and repeat this activity until everyone has a chance to facilitate. Once everyone has facilitated, bring the group back together and ask the groups to share their experience of being facilitators and participants during this activity.

After participants complete the small group activity and you processed out, ensure that you tell participants, similarly to the delicate balance of coordinating, there is also a delicate balance necessary when facilitating. When the family discusses concerns, it is critical to keep in mind that you are a facilitator and not a therapist. One's role as a facilitator is simply to assist the FGDM participants in identifying true concerns and their sources so that the family may find ways to address the issues.

Step 10: Phase 2: Information Sharing: Bottom-Line Concerns
(5 minutes)

Display **PowerPoint Slide #23 (Phase 2: Information Sharing)** and inform participants that after the concerns are solicited, the facilitator will ask the referral source to share the non-negotiables also known asBottom-Line Concerns. As discussed in 207: Introduction to Family Group Decision Making (FGDM): Part I, this is the only point at which the referral source and service providers should offer concerns. The reason for this is that families know each other best, and families will be able to give specifics about their concerns. By the time the providers and agency have the opportunity to share their concerns, the majority, if not all, of the concerns that need to be addressed to accomplish the purpose tend to be offered. In identifying their concerns, families often share the same concerns as the child welfare agency. As a result, it is very likely that they will have already identified and listed the agency's non-negotiables. This being the case, one approach the child welfare professional can take in sharing the agency's non-negotiables is to use the work the family has already done. The child welfare professional, with the family's permission, may walk to the flip chart pages that contain the family's concerns and simply circle those concerns that the agency has identified as non-negotiables. If there are any non-negotiables that have not been identified by the family, the child welfare professional should identify them at this point.

When offering the non-negotiables, it will also be important to discuss any timeframes/constraints that would affect the family's decision making/planning process (*e.g.*, Adoption and Safe Families Act, court related/ordered timeframes, *etc.*). The family has to make sure that they address these concerns during Private Family Time, which is Phase III of the FGDM meeting.

Stress that not every meeting will have Bottom-Line Concerns (*i.e.*, youth transition, aging population or family self-referrals) that are addressed above.

Once the non-negotiables have been shared, the last step in phase two of the FGDM meeting is sharing of resources. Families will begin by offering resources that are available to them. When the family has finished sharing resources, the referral source and service providers may then share resources. It should be stressed that these are options or suggestions and not requirements for the family. This may also be the time when a guest speaker would present information on a possible resource or on a particular concern that the family is addressing (*e.g.*, mental health, drug and alcohol, possibly domestic violence issues, *etc.*).

Usually, at this point in the meeting, there is a natural break where the meal is served. The facilitator will make sure that the family is prepared for Private Family Time and that the family understands what should take place during this phase of the FGDM meeting.

Step 11: Group Dynamics and Facilitation
(5 minutes)

Distribute **Handout #17 (Group Dynamics and Facilitation)**. Discuss the sections on the handout. Participants might have presented concerns that they had about struggles they might face/have faced during meetings. Make the tie that the handout begins by looking at Challenges Facilitators May Face and then moves on to look at "Types" of Participants and Methods to Engage Them and Markers of Effective Facilitation.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section VII: The Meeting: Phase III

Estimated Length of Time:
35 minutes

Learning Objectives:
Participants will be able to:
- ✓ Describe how to prepare a family to participate in Private Family Time.

Method of Presentation:
Lecture, Video, Large Group Discussion

Materials Needed:
- ✓ DVD Player/TV
- ✓ External Speakers (for Laptop)
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ ***DVD: FGDM Mock Conference***
- ✓ **Handout #18: Preparing for Private Family Time**
- ✓ **Handout #19: Plan Documentation**
- ✓ **Handout #20: Keys to Successful Private Family Time**
- ✓ **PowerPoint Slide #26: Phase 3: Private Family Time**

Section VII: The Meeting: Phase III

Step 1: Plan Documentation
(10 minutes)

Display **PowerPoint Slide #26 (Phase 3: Private Family Time)** and inform participants that they are now ready to move into the third phase of the meeting. Share that the facilitator will make sure that the family is prepared for Private Family Time. Private Family Time is the most critical portion of the Family Group Decision Making meeting. This is when all of the hard work during the Preparation stage and the beginning of the meeting comes together. This is the family's opportunity to develop a plan to meet the needs of the child they all love. This can be a little overwhelming and families may wonder what really makes a plan successful. Distribute **Handout #18 (Preparing for Private Family Time)** and inform participants that this handout is a resource that they may use when preparing families to enter Private Family Time. Tell participants that the list of questions should look familiar to them, as they received a nearly identical list in a handout titled "Preparing the Family to Develop a Successful Family Plan", when discussing family preparation. This handout simply has a different opening paragraph regarding the use of the questions. The facilitator can review the same questions with the family prior to the start of Private Family Time to help them begin to think about what components they would like to include in their plan to give it the best chance for success. It is important to note that this is not a list of requirements for the family, simply a list of considerations that they may choose to make.

Similarly, the facilitator should offer considerations surrounding approaches to documenting the family plan. The facilitator may use **Handout #19 (Plan Documentation)** to explain the expectations (*i.e.*, Who? What? How? and When?) for the family and the details that should be in their plan. The facilitator may also wish to explain S.M.A.R.T. goals to the family. It is important to stress to families the value of incorporating a backup arrangement should something not occur as planned. It is also important to note that families should document who will be responsible for monitoring plan implementation and follow-up.

The facilitator can say something similar to:

> "This is the time to talk things over as a family in private and come up with a plan to address (the purpose) and the Bottom-Line Concerns. Those of us who are not part of your family will be outside the room, outside of earshot so we cannot overhear. If you need help with anything, please ask. Once you have put together a plan that you all agree to, please come and get us."

It should be shared that part of successful coordination is preparing the family and making sure they understand what should be accomplished in Private Family Time, even before the meeting begins. The discussion at the meeting will clarify these points and educate some of those individuals that were not educated on the process prior to the meeting.

Step 2: Identifying Roles for Private Family Time
(5 minutes)

Share that the family should identify a family representative that will document the discussion and write down the decisions that are made during Private Family Time. This individual or another family representative should be selected to share the families plan with the facilitator, referral source, and other providers who are present following Private Family Time. A second volunteer may also be asked to help keep the family focused on the purpose and to remember the guidelines.

Trainer Note:	Different counties provide different resources for the family to document the content of the decision-making and planning process.

Step 3: The Role of Service Providers During Private Family Time
(5 minutes)

Share that prior to the start of Private Family Time, all service providers/county agencies and observers leave the room and go to the predetermined area to wait until the conclusion of this phase of the meeting. Only the referral source has to remain at the meeting to approve the plan. All other service providers/county agencies are free to leave at this time.

Step 4: Keys to Successful Private Family Time
(5 minutes)

Distribute **Handout #20 (Keys to Successful Private Family Time)** review and highlight that when the family is in Private Family Time, the facilitator must encourage those not in Private Family Time to not talk about the family or details of the family's situation or meeting. Probably the worst possible scenario would be for a trusting family member coming upon service providers/county agencies discussing the family. The facilitator will maintain privacy of the room and make sure nobody has access to it. Sometimes, depending on where the meetings are held, this may have to be arranged prior to the meeting. The facilitator will share that service providers/county agencies are free to leave, except for the referral source.

The coordinator or facilitator should make sure that participants complete an evaluation form prior to leaving the meeting. The FGDM Evaluation Sub-Committee develops the form. Individual counties may choose to develop and use their own form. The standardized form is stored at http://www.pacwrc.pitt.edu/FGDM.htm and engagepa.pitt.edu, along with other resources.

Step 5: FGDM Mock Conference Video Clip: Private Family Time

(10 minutes)

Show the “Private Family Time” clip from the ***DVD: FGDM Mock Conference***, which is slightly over 2 minutes in length. After viewing the “Private Family Time” clip, as a large group, ask participants to discuss what they observed and whether they would prepare the family for Private Family Time in a similar or different manner.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section VIII: The Meeting: Phase IV

Estimated Length of Time:
20 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the skills a facilitator needs to assist the family in presenting the family plan;
- ✓ Explain how the FGDM family plan is presented and accepted; and
- ✓ Describe how to close a FGDM meeting.

Method of Presentation:
Lecture, Large Group Discussion

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Markers
- ✓ Masking Tape
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **PowerPoint Slide #28: Phase 4: Presentation of Family Plan & Acceptance**
- ✓ **PowerPoint Slide #29: What Participants Think: Recommendations and Safety**

Section VIII: The Meeting: Phase IV

Step 1: Presentation of Family Plan
(10 minutes)

Explain that when the family is ready, they will call the facilitator, co-facilitator, provider representatives, and the referral source back into the room.

State that prior to the family representative presenting the plan, the facilitator should acknowledge the hard work of the family and validate the efforts during Private Family Time. Further, convey that the facilitator should explain to the family that it is important for the group to take time to review the plan even though they may be tired and are ready to end the day. Underscore that the facilitator must acknowledge the family's hard work.

Display **PowerPoint Slide #28 (Phase 4: Presentation of Family Plan & Acceptance)** and inform participants that you are now entering the final phase of the FGDM meeting, which is Presentation of Family Plan & Acceptance. Describe how the facilitator will have a family representative present and share the details of the family plan. Remind participants that the family representative is selected by the family during Private Family Time. The presentation of the family plan represents Phase IV of the meeting. Explain that throughout the presentation of the family plan, the facilitator should ask questions, seek clarification, and confirm that the information in the plan addresses safety of the children and all of the identified Bottom-Line Concerns. Provide the following examples of questions a facilitator may use:

- Did you discuss….?
- Are you willing to consider….?
- Can we discuss this part of the plan in more detail?

Refer participants back to the questions they discussed during the Concerns Under the Concerns activity, and ask whether participants believe that they could use those questions and/or have other questions that they would like to use.

Explain that the use of the questions they discussed helps the facilitator ensure that all aspects of the plan are clear regarding "who", "how", "what", and "by when" being addressed.

Step 2: Referral Source Acceptance
(5 minutes)

Explain that in addition to listening to the family describe their plan, the facilitator must solicit the agreement of the referral source in regards to the Bottom-Line Concerns. Explain that the facilitator should ask the referral source to consider the identified Bottom-Line Concerns and the information contained in the family plan and should ask the referral source if they can accept this part of the family plan. Inform participants that this discussion should occur for each Bottom-Line Concern until the referral source can agree to the family plan in its entirety and is willing and able to support the plan. Explain that the referral source should have an understanding/agreement with their supervisor about what s/he will approve. Explain that best practice is for the referral source to meet with their supervisor to discuss what s/he feels must be included in the plan to assure safety and meet necessary agency outcomes.

If there is not enough detail, the facilitator can work with the group to firm up the details. If there is enough work that still has to be completed, the facilitator may request that the family return to Private Family Time and work out the plan in more detail.

Step 3: Family Ritual and Meeting Conclusion
(5 minutes)

Once the plan is accepted, the facilitator will thank everybody for attending and for their commitment to the family. The meeting will conclude with the ritual that the family chose prior to the beginning of the meeting.

State at the conclusion of the meeting, that the facilitator will ask participants to complete a satisfaction survey or other instrument to gather participant feedback and whether or not they would like to have a follow-up meeting.

Trainer Note:	As mentioned previously, the FGDM Evaluation Sub-Committee has standardized tools for counties to use to gather participant feedback. These forms can be obtained at engagepa.pitt.edu or by contacting The Pennsylvania Child Welfare Resource Center. Although these standardized forms exist, counties may have different protocol and instruments for data collection.

Display **PowerPoint Slide #29 (What Participants Think: Recommendations and Safety)** and ask participants why they think natural supports and professionals believe children are safer as a result of the FGDM plan? Point out that if families are recommending FGDM to other families and feel that the children are safer because of it, this can be an indication that FGDM is a powerful tool with the potential to have significant positive impacts on the lives of the children and their families.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section IX: After the Meeting: Plan Follow-up/Meeting Follow-up

Estimated Length of Time:
20 minutes

Learning Objectives:
Participants will be able to:
- ✓ Recognize how follow-up helps the family and their resources monitor the plan and update the plan to increase its longevity; and
- ✓ Identify the components of a follow-up meeting.

Method of Presentation:
Lecture

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Handout #21: Follow-up in FGDM**
- ✓ **Handout #22: Is the Plan Working?**

Section IX: After the Meeting: Plan Follow-up/Meeting Follow-up

Step 1: Follow-up and Monitoring the Plan
(5 minutes)

Using **Handout #21 (Follow-up in FGDM)**, stress that the main roles identified in the follow-up of a family plan are the family members and the referral source. The family plan should address who is responsible for follow-up and monitoring the plan. This should be clarified in the beginning of the coordination so that the family knows from the beginning that this is their plan and they are the main individuals responsible for implementing and following through with the family plan. This should also be addressed at the FGDM meeting so that all participants understand who is involved in the implementation of the family plan and can assist those individuals to ensure that the family plan is completed. Note that the family should address monitoring and follow-up at the FGDM meeting so that all participants know what should be done if the plan is not followed or implemented. In addition, the family should plan back-ups for their plan in case the initial person identified is not able to implement their part of the family plan. This will help ensure that the family plan is successful.

Distribute **Handout #22 (Is the Plan Working?)** to participants and offer that this is a resource that coordinators can use with their families during implementation to monitor their plan. Coordinators may even choose to provide a copy of the handout to family members. The handout consists of a list of questions that family members can ask themselves to help monitor implementation of their plan. Review the questions on the handout with participants and ask if they have any additional questions that families might ask themselves to help monitor implementation of their plan.

Step 2: Who Participates in a Follow-up Meeting?
(5 minutes)

Stress that a follow-up meeting should be offered to every family that participates in the FGDM process. If a family chooses, a follow-up meeting can be scheduled at the FGDM meeting or can be requested by any family members at any time following the meeting. The details of how a family member can request a follow-up meeting should be covered at the FGDM meeting. Note that any individual that was invited to the original meeting can be invited to the follow-up meeting. The family will identify who they want to participate in their follow-up meeting.

Step 3: What Happens During a Follow-up Meeting?
(5 minutes)

Identify what is involved in a typical follow-up meeting. A follow-up meeting is usually shorter than a FGDM meeting, typically one and one-half to two hours. The meeting will start with introductions and then the group will discuss what has been going well with the plans (the strengths) and what parts of the plan need to be addressed or modified (the concerns). The family will choose if they wish to participate in Private Family Time or if they would like to address the concerns with the entire follow-up team.

Step 4: When Should Follow-up Meetings Occur?
(5 minutes)

Explain that additional follow up occurs with families in different ways. In some counties, in addition to the child welfare professional fulfilling their responsibilities, there are evaluations completed at 3, 6, 9 months and 1-year intervals, often by the administrative support staff, to collect data from three to five family members who were “significant” to the implementation of the plan. If information is gathered that is new or recurring, the family member is then encouraged to call the referral source.

The progression should move towards completely turning the process over to the family. Remind participants of one of the fundamental beliefs of FGDM, which is “Empowering families will lead to families controlling their lives.”

207: Introduction to Family Group Decision Making (FGDM): Part II

Section X: Mock Family Group Decision Making Meeting

Estimated Length of Time:
1 hour, 25 minutes

Learning Objectives:
Participants will be able to:
- ✓ Recognize the steps needed to facilitate a FGDM meeting; and
- ✓ Recognize the key components of a FGDM meeting.

Method of Presentation:
Lecture, Large Group Activity, Large Group Discussion

Materials Needed:
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Handout #5: The Four Stages of FGDM and Related Roles** (revisited)

Section X: Mock Family Group Decision Making Meeting

Step 1: Preparation for the Mock FGDM Meeting
(10 minutes)

Ask participants to use **Handout #5 (The Four Stages of FGDM and Related Roles)** (revisited) as a resource if they are unsure of what the roles involved in the meeting entail. Explain the role of the co-facilitator for this process and share some tips to make the job easier. For example:

- tearing off flip chart paper sheets;
- holding markers and alternating colors; and
- having tape prepared ahead of time.

Set up the mock FGDM meeting by reminding participants that they were assigned roles earlier in the training from the case the large group identified. For the purpose of this exercise, you will play the role of the facilitator.

Share that there may be points of learning during the mock FGDM meeting where the group will be stopped to address issues that come up. Sometimes there may need to be a break in roles to address these issues and you will let participants know when they need to return to role.

Step 2: Mock FGDM Meeting
(1 hour)

Begin the mock FGDM meeting by sharing the following example of what the facilitator can say to begin the meeting: "Hello, I am (Your Name) and I wanted to take this opportunity to welcome you to the (Family) Family Group Decision Making meeting. On behalf of the family, I would like to thank all of you for your participation and commitment to the family and this process. Some of the information that we are going to talk about today may be sensitive and difficult to talk about, although the commitment of everybody here today will assist you in getting through this and creating a wonderful plan."

Have the group participate in the mock FGDM meeting and cover the major content areas of an actual FGDM meeting. Share input pertaining to the mock FGDM meeting and make sure that participants have a good understanding of the role they are to play and when they should contribute to the discussion. The co-facilitator will continue to document the comments and information shared. Conclude this section by using a question and answer discussion to clarify the components of the mock FGDM meeting. Allow approximately 25 minutes for Welcome and Introductions and Information Sharing, 25 minutes for Private Family Time, and 10 minutes for Presentation of Family Plan and Acceptance.

Trainer Note:	During Private Family Time, spend time processing the experience of not being in with the family. This is also a great time to share personal experiences with meetings and allow participants to ask questions. This time must remain focused on learning.

Step 3: Processing the Mock FGDM Meeting
(15 minutes)

At the conclusion of the mock FGDM meeting, validate how the participants performed throughout the activity and have participants share their experience. Give participants an opportunity to ask questions about the FGDM meeting.

207: Introduction to Family Group Decision Making (FGDM): Part II

Section XI: Wrap-up and Evaluation

Estimated Length of Time:
15 minutes

Learning Objectives:
Participants will be able to:
- ✓ Share their input on their experience throughout the two-day training and
- ✓ Evaluate the experience of attending this training.

Method of Presentation:
Lecture, Large Group Discussion, Individual Activity

Materials Needed:
- ✓ Evaluation Forms
- ✓ Flip Chart Pads
- ✓ Flip Chart Stands
- ✓ Laptop
- ✓ LCD Projector/Screen
- ✓ Markers
- ✓ Masking Tape
- ✓ Trainer Prepared Flip Chart: *Parking Lot*
- ✓ Trainer Prepared Flip Chart: *What's In It for Me*?
- ✓ **Handout #23: Action Plan**
- ✓ **Handout #24: References**
- ✓ **PowerPoint Slide #33: Questions and Answers**

Section XI: Wrap-Up and Evaluation

Step 1: WIIFM and Parking Lot
(10 minutes)

Engage participants in a discussion pertaining to their experience throughout the two-part training, validate, and thank participants for sharing. Have participants process through the experience and share input on what they gained from it.

Review the *What's In It For Me* (WIIFM) poster making sure that all points were addressed. Also review the *Parking Lot* poster and assist participants in identifying any possible resources that may meet their needs.

Trainer Note:	It may be beneficial to compile some questions for the group to help with the discussion of the overall experience throughout the training.

Step 2: Questions & Answers and Action Planning
(5 minutes)

Summarize key learning points from the day and get participants' feedback on the content of the presentation. Show **PowerPoint Slide #33 (Questions and Answers)**. Give participants the opportunity to ask questions. Answer questions, address and validate comments.

Distribute **Handout #23 (Action Plan)** and ask participants to identify a family they believe would benefit from the FGDM process.

Refer participants to **Handout #24 (References)** for additional resources and information. Thank participants for participating in the training. Ensure that all participants complete evaluations before they leave.

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