Virtual Technologies Work! Team-Based Supports and Planning

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Introduction. Team-based support and planning is nothing new. Over 130 years ago, Jane Addam's Hull House used neighbors and friends to provide help for stressed families. Dozens of additional team-based planning, support and services innovations have been developed. This includes among many others, team-based support and planning processes such as Wraparound;
Family Group Decision-Making; Restorative Justice Teams; The Open Table; and Circles of Support. As one of the founders of the Wraparound Process, and a consultant to The Open Table, I have spent much of the last 35 years spreading the word about team-based planning.

When the COVID-19 virus appeared and was determined to be highly contagious, many individuals and community system of care leaders contacted me about what could be done to continue supports. My answers are summarized in this brief paper – I am convinced that as a field, we will respond like we always have, with innovation and dedication! This paper is not designed to teach details about each team-based planning and support process, but rather to share information about how to insert virtual technologies into these processes. Many team based support and planning processes use different terms to refer to the "clients." In this paper, I use the term person/family to refer to those whom the support is focused on.

Team-based planning and supports. There have been millions of individuals and families who have gone through team-based processes. At the heart of each of these innovations is a group of persons physically coming together with the person/family with needs, and then having face-to-face meetings on a scheduled basis. Clearly, in a time of limiting social contact due to COVID19, these processes will be questioned and even discouraged. In a time of government prohibiting groups of people being together, we need team-based supports and meetings more than ever. Individuals and families who are ready isolated and stressed can become even more isolated and stressed in times like these.

Why we know a virtual approach can work! The field of distance learning (also called remote learning) was first developed over 165 years ago as a way of increasing the number of individuals trained to do shorthand. We now have numerous apps available to us to assist with virtual communication.

As an international Wraparound consultant, I was often exposed to distance learning options. For example, in the mid 1990's, in supporting Wraparound work in Saskatchewan (which is several times the size of Texas), the provincial authorities oriented me to sit in a studio in

Regina and train groups all over the province. Their approach was laudable, because doing effective distance learning often requires learning new skills.

For example, one of the skills involved in the Saskatchewan trainings was in-advance prepping with local group facilitators to ensure that the local groups could ask questions by passing a note to the local group facilitator, who then emailed the note to me. I would read the note and answer the question. As a result, the local groups felt truly part of the training process, and like any good trainer, I was able to mold the training to the needs of the remote groups.

Research on challenges and strengths of distance learning and virtual technologies. There have been numerous studies on the effects of distance learning and use of virtual technologies. This research identified challenges and strengths associated with distance learning and virtual technologies.

Some of the challenges with distance learning/virtual technologies includes:
- It is harder to do initial engagement of persons with complex needs.
- It can be harder to ensure strong group cohesion.
- There is a need for strong facilitation to ensure individual team members participate.
- Technology scares many people, or they don't have access to technologies.
- Individual team members may feel more comfortable not volunteering for individual tasks.

Some of the strengths of distance learning/virtual technologies includes:
- Having better access due to efficiency.
- Increasing the number of persons served as a result of having a more efficient process
- Lower costs due to reduced travel and meeting arrangements.
- Increasing the number of potential team members willing to serve on a team, due to more efficient use of their time.
- The need for more routinization of meeting processes, such as ground rules for meetings and methods of ensuring participation by all involved.
- Ensuring a safe place. Participants report that they have an easier time maintaining emotional safety.
- Time management. Overall, virtual meetings save transport and other logistical time use. In addition, virtual meetings can reduce distractions and help keep the group on task.
- Technology is better than ever. For example, few persons under 35 years of age are afraid of Facetime! The prices of assistive devices such as tablets are more reasonable than ever, and many people use their smart phones for virtual meetings.

Facilitation. Almost all team-based planning involves use of trained facilitators. In High Fidelity Wraparound, facilitators learn team-support skills and are often formally certified as competent in facilitation. Many Wraparound teams ask the person/family to co-facilitate from the very first meeting. Many persons/family members will need support to learn virtual co-facilitation roles, but the message given to the team is one of how important the person/family is to the process of facilitation.

Often, team-based planning facilitators have been trained to manage face-to-face processes but can be supported to quickly learn virtual team planning facilitation. However, especially in the area of ensuring team participation, virtual team planning requires learning new skills.

Engagement challenges. Initial engagement of individuals and families with complex needs is very important to eventual outcomes. Often, in working with child welfare and juvenile justice agencies, I was awed by the engagement skills of staff, given the gravity of dealing with child abuse, neglect, or criminal behaviors. These skills involved body language, watching client reactions, emotional re-assurance, and dozens of techniques coming together to help a family begin their journey in these systems. Each of the team-based planning techniques involves training for strong engagement skills which can help a person/family start a journey towards healing.

Can engagement be done virtually? Absolutely. Here are some defined skills and steps:

- **First contact.** The first engagement meeting can be done virtually for persons/families who are referred to team-based planning. The facilitator would make numerous advance phone contacts. On these calls, they would have "get to know you" time and share information about the team-based planning process. The facilitator would disclose details about their own lives and roles. In the old days, we were trained not to share details about ourselves, but although following good boundaries is important, no one would want to trust someone whom they do not know. In the Open Table model, this mutual disclosure has been proven to produce teams which continue to provide support long after formal graduation from the model.

- **During these first contacts, the facilitator should ask the person/family about their preferences for team communication**. A wide range of potential options are available to meet person/family preferences.

    - Ask the person/family about their communication preferences. Some persons who are very leery of technology may choose to use phone calls only, or choose to start with phone and add visual option such as Facetime at a later time.
    - Others may not have any smart devices or computers or know how to use them. In these cases, assuming the person agrees, a team member can mentor the

person/family on getting the devices either purchased or donated. A tablet is fairly inexpensive, and donations of tablets are available as people upgrade to new devices. Ideally, a program doing team-based planning will keep a supply of "loaner" devices. Family members who have graduated team-based planning can be very helpful in mentoring new persons/families by phone or device.

- o The team member can brainstorm with the person/family about their preferences regarding acquisition of skills in virtual communications such as FaceTime, Zoom, Hangout, or other methods.

- **Team composition.** Most team-based planning methods stress the need to balance paid professionals and natural supports. Some models such as Open Table consist of teams that are all volunteers, with any paid professionals serving in consultation roles. In virtual team meetings, inclusion of natural supports is even more important than in nonvirtual meetings. Teams should include graduates of team-based planning processes. For teams focused on the needs of families or transition-age youth or young adults, it is absolutely essential to have youth or young adult team members.

- **Person/family preferences about meeting management.** During first contacts, the facilitator can ask persons/families to share their preferences for how meetings are managed. Most persons/families involved in services experience dozens of meetings, involving the "good, the bad, and the ugly" of meeting processes and outcomes. The person/family needs to understand that this meeting is based on their preferences about how meetings should proceed. For example, the facilitator can introduce the topic of ground rules and person/family preferences about ground rules. A common ground rule in virtual planning is to ask the team members to be mentally present and involved, vs. being on their phones or doing other tasks during the meeting. A person/family may want one person to talk at a time or want initial meetings to include tight time schedules.

- **Technology for virtual meetings**. All team meetings would be done using remote meetings apps and technology (ZOOM, Facetime, Google Hangout, etc.). It is essential when using these technologies or remote meeting apps for the facilitator to have the skills of using the preferred method. We have all been on planned calls that aborted when the technology either failed or was not understood by the facilitator, or when the person/family was not prepared to use the technology.

  Larger sites with many persons/families involved with team-based planning may consider having a technology preparation specialist who mentors and oversees the process of preparing the person/family and the planning team for using the chosen technology.

- **HIPAA compliance.** Special attention to HIPAA compliance must be taken as needed by an organization. This paper is not meant to share how to ensure compliance, but I recommend awareness of this. For example, Zoom can be deemed a HIPAA compliant web and video conferencing service that is appropriate for use in healthcare, provided a HIPAA-covered body completes a business associate agreement with Zoom prior to using the service.

Crisis management. As part of engagement, most team-based planning methods start with some initial examination of immediate crisis management needs, of major family needs, family culture, and strengths. In Wraparound, for example, most programs begin with initial crisis assessment and stabilization. This can be done via phone. In Family Group Decision Making, a safety professional works with the family to assess child safety, by asking the family and/or family networks about their perceptions of family safety issues. Often crisis assessment is done in the first engagement meeting but is also commonly done via phone interviews.

Introduce the team in the first virtual meeting after engagement. In some methods of team based planning, a team is in place and the person/family is matched with the team. This is the way the Open Table process is typically managed. Some communities working in juvenile justice have standing Restorative Justice Teams, but most team-based planning teams are individualized and are family-specific, such as with Wraparound and Family Group Decision Making. This step could be done via phone interviews, assuming some initial engagement has occurred.

Ground rules. The person/family should have been asked about their preferences for ground rules for the group. In virtual teams, the need for ground rules may be greater than in the in person group planning as group dynamics will not always serve to regulate team behaviors. Common ground rules for virtual planning include:

- Team members and the person/family must commit to being present at the meetings if at all possible, and if they cannot attend the meeting, to reviewing the agenda in advance and giving their input to the facilitator to share with the group at the appropriate time in the meeting.
- Be fully present and available for active participation – avoid other tasks, concentrate on the meeting, and avoid distractions to the group and to themselves.
- Team members should let other team members speak without being interrupted. Take turns speaking by raising hands or if it is a phone meeting, by saying "I would like to comment," which lets the facilitator call on the team member as soon as possible.
- Have a process, defined in advance, for re-joining the meeting if the team member loses connection to the group. Most meeting technologies such as ZOOM have clear procedures for this.

- Strong facilitation. In virtual meetings, an overly enthusiastic or demanding team member can limit the effectiveness of the team meeting. Facilitators must exercise firm meeting management, without discouraging participation. Participation is monitored by the facilitator. In virtual meetings, it is easy for some team members to stay silent or simply avoid comments.
- Team members are asked to stay positive and to express concerns in a direct way without blaming or shaming the person/family or each other.
- Virtual meeting facilitation should include "going around the room" where each team member is asked to respond to encourage participation from everyone who is present. A common method of ensuring team participation is to ask team members to text the facilitator with questions or comments, and to text the entire team during the meeting as needed. Some of the team-based meeting technologies such as "Go to Meeting" have elaborate methods of capturing comments and questions.
- Most team-based planning methods have ground rules about maintaining confidentiality. I recommend that part of the introduction time should include a verbal statement by each team member that they will respect confidentiality.
- Most team-based planning methods have some version of "never about us without us" as a way of ensuring that individual team members do not discuss the person/family outside of the meetings. I recommend that this value be verbally affirmed by each team member during the introduction time.

Team cohesion and trust. Strong team cohesion and trust begins with team members and persons/families learning information about each other. This includes team members sharing who they are, why they are helpers, when they have needed help from others, what they can offer in the areas of special skills, and their goals for being part of team-based planning. This time is about establishing every team member not as the savior of the downtrodden, but rather as a person who also needs and gives support. At this time, the person/family can share their own definition of their major needs. Ideally, this information is recorded and available for new team members who may join the team.

I recommend that the team have a process for team members who have to leave virtual meetings early. A team member should never just disconnect from the meeting -- good meeting manners mean that the team member try to attend all of each meeting, and then if they have to leave early, let their fellow team members know in advance.

Agendas. Almost all team-based support meetings use detailed agendas and time-limited meetings. Agendas are even more important for virtual meetings. Facilitators should work with the person/family to develop the agenda. Agendas must be shared with the person/family and team members in advance of the meeting. Facilitators must practice active monitoring of times used for each agenda item. Most team-based planning methods limit meetings to an hour or

less. The quickest way to derail a team is to not follow an agenda and have meetings consistently go over the allotted time.

Evaluation of Team meeting effectiveness. Most team-based planning incorporates methods of informal or formal evaluation of the effectiveness of meetings. For example, an informal method may involve each team member and the person/family giving a 1-10 rating about how the meeting went, noting strengths and what could be done to make the meeting even better next time. A more formal method of meeting effectiveness may involve a separate evaluation filled out by each team member and the person/family and compiled by the facilitator. These ratings can be shared in the first part of the agenda for the following meeting. With virtual meetings, meeting effectiveness evaluation is even more important than in face-to-face meetings.

Contact of Team members with person/family outside of Team meetings. Team-based supports and planning vary in how to handle person/family contacts outside Team meetings. For most team-based planning, frequent yet brief phone calls, email, and texting contacts with the person/family help build the ever-essential relationships which will sustain the planning over time.

Summary. Maximizing the use of virtual meetings and support is vital to the survival of team-based planning. This brief paper is designed to raise major issues involved with virtual meetings, and I encourage each locality to bring stakeholders together to develop and further refine how virtual supports and meetings will be done.

Dr. VanDenBerg is one of the founders of the Wraparound Process, which is the dominant team-based planning process used in North America. He is currently retired from most Wraparound training and is a volunteer in supporting the Open Table, a national poverty intervention process similar to Wraparound. His email address is jevdb1@gmail.com.