



**D11 Trust but Verify: Effective
Management Tools to Promote
Positive Outcomes, Motivated Staff
and Achieve a Centralized Goal**

Thursday, June 16, 2016, 10:30 a.m.-12:00 p.m.

Antonio Mejico, Jr.

Salon 7

* “Trust but Verify”

Effective Management Tools to Promote Positive Outcomes,
Motivated Staff and Achieve a Centralized Goal

Partnership for Well-Being Institute
June, 2016
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*Welcome & Introduction

*This Training is for you...

- *If you are a new manager working within a Wraparound Program.
- *If you are a seasoned manager looking for new ideas.
- *If you are a tired manager that is looking to re-energize, motivate or connect staff to a common goal or purpose.
- *If your boss told you to be here.

*TODAY'S TOPICS


Context	Systems	People
<ul style="list-style-type: none">• Model• Structure	<ul style="list-style-type: none">• Benefits• Tracking• Monitoring• Discussing	<ul style="list-style-type: none">• Hiring• Coach, Manage, Discipline• Helping staff through transition



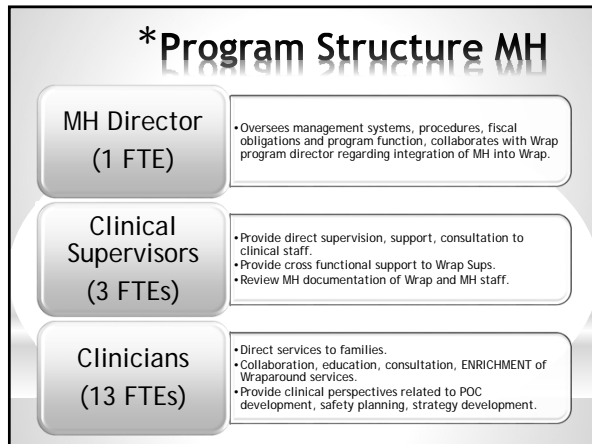
*It Takes Work

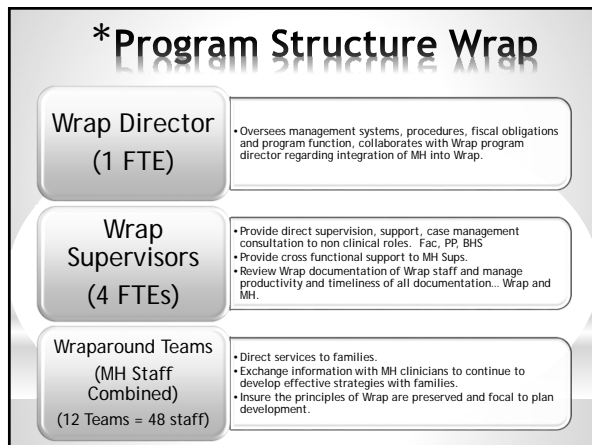
*Origins of our Integrated Model

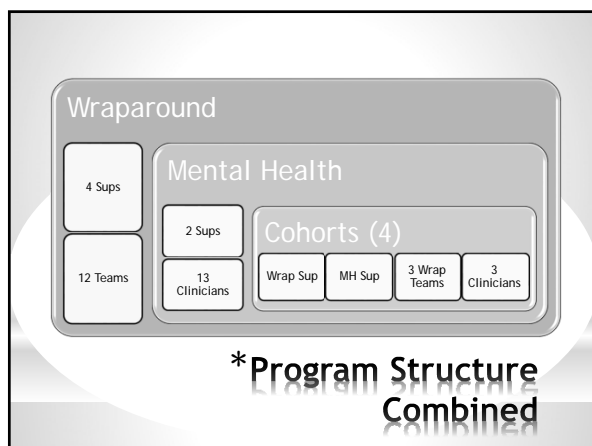
Wrap Contract + MH Contract = Integrated Model

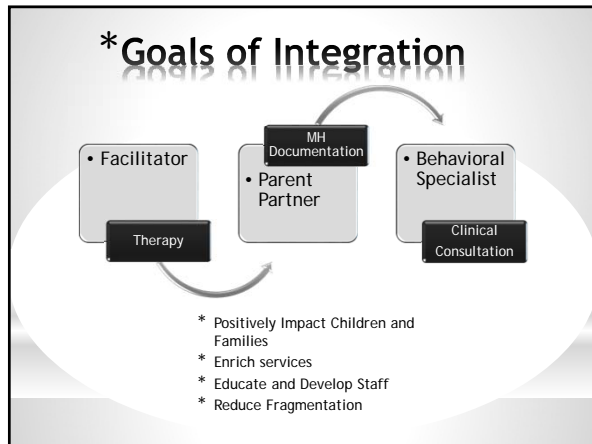


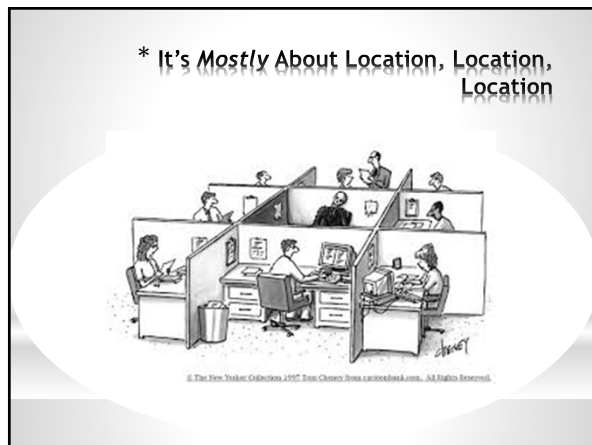
Frank and Ernest

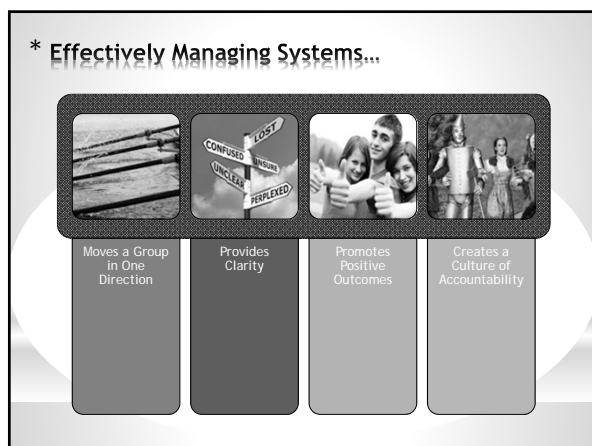


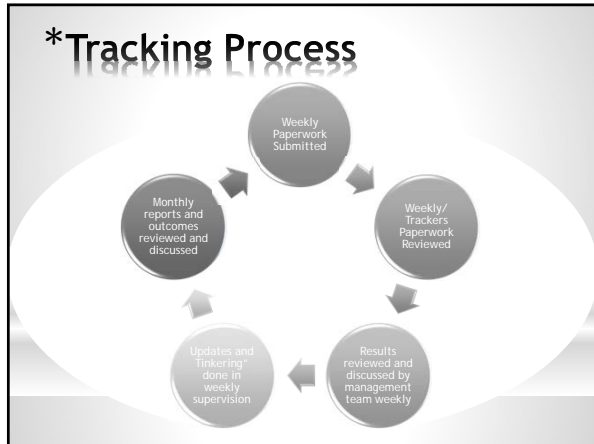












- *Outlook calendars
 - *Weekly Agendas and Minutes
 - *Weekly 1:1 notes
 - *Weekly Tracking Logs
 - *Weekly MH Activity
 - *Weekly Supervision
- *Weekly/ Monthly Documentation and Communication**

***Client Tracker**

The screenshot displays a Microsoft Excel spreadsheet titled "Olive Crest Wraparound Client Tracker 2018-19". The spreadsheet is divided into two main sections: "Team 1" and "Team 2".

Team 1 Section:

- Worksheet Name:** Team 1
- Formula Bar:** =SUM(B2:D2)
- Columns:** Name, Age, Gender, Race, Ethnicity, Religion, Primary Care, Mental Health, Status.
- Rows:** 1-15 (Clients listed).

Team 2 Section:

- Worksheet Name:** Team 2
- Formula Bar:** =SUM(B2:D2)
- Columns:** Name, Age, Gender, Race, Ethnicity, Religion, Primary Care, Mental Health, Status.
- Rows:** 1-15 (Clients listed).

The spreadsheet is titled "Olive Crest Wraparound Client Tracker 2018-19". The status bar at the bottom indicates the file is "Book1.xlsx" and the active cell is "A1".



The screenshot shows a Microsoft Excel spreadsheet titled "Unitary productivity report". The spreadsheet has a tab labeled "Unitary" and contains data organized in columns. The columns are labeled: "Month", "Country", "Year", "Country", "Year", "Country", "Year", and "Country". The data rows show values for various countries, including USA, Canada, Mexico, and others. The values range from 1.0 to 1.5. The spreadsheet is titled "Unitary productivity report" and has a tab labeled "Unitary".

Month	Country	Year	Country	Year	Country	Year	Country
Jan	USA	2000	Canada	2000	Mexico	2000	USA
Feb	USA	2000	Canada	2000	Mexico	2000	USA
Mar	USA	2000	Canada	2000	Mexico	2000	USA
Apr	USA	2000	Canada	2000	Mexico	2000	USA
May	USA	2000	Canada	2000	Mexico	2000	USA
Jun	USA	2000	Canada	2000	Mexico	2000	USA
Jul	USA	2000	Canada	2000	Mexico	2000	USA
Aug	USA	2000	Canada	2000	Mexico	2000	USA
Sep	USA	2000	Canada	2000	Mexico	2000	USA
Oct	USA	2000	Canada	2000	Mexico	2000	USA
Nov	USA	2000	Canada	2000	Mexico	2000	USA
Dec	USA	2000	Canada	2000	Mexico	2000	USA

Quarterly Revenue Report - All Staff											
summary											
ID	Name	Region	Q1 Rev	Q1 Tgt	Q2 Rev	Q2 Tgt	Q3 Rev	Q3 Tgt	Q4 Rev	Q4 Tgt	Annual Summary
											Rev
1	John	North	120	120	130	130	140	140	150	150	520
2	Jane	North	110	110	120	120	130	130	140	140	500
3	Bob	North	100	100	110	110	120	120	130	130	460
4	Alice	North	90	90	100	100	110	110	120	120	420
5	Charlie	North	80	80	90	90	100	100	110	110	380
6	Diana	North	70	70	80	80	90	90	100	100	340
7	Eve	North	60	60	70	70	80	80	90	90	300
8	Frank	North	50	50	60	60	70	70	80	80	260
9	Grace	North	40	40	50	50	60	60	70	70	220
10	Heidi	North	30	30	40	40	50	50	60	60	180
11	Ivan	North	20	20	30	30	40	40	50	50	140
12	Judy	North	10	10	20	20	30	30	40	40	70
13	Karl	North	5	5	10	10	15	15	20	20	35
14	Larry	North	3	3	5	5	7	7	9	9	24
15	Mary	North	2	2	3	3	4	4	5	5	16
16	Nancy	North	1	1	2	2	3	3	4	4	10
17	Oscar	North	0	0	1	1	2	2	3	3	6
18	Peter	North	0	0	0	0	1	1	2	2	4
19	Quinn	North	0	0	0	0	0	1	1	1	2
20	Rachel	North	0	0	0	0	0	0	1	1	1
21	Sam	North	0	0	0	0	0	0	0	0	0
22	Tina	North	0	0	0	0	0	0	0	0	0
23	Uma	North	0	0	0	0	0	0	0	0	0
24	Victor	North	0	0	0	0	0	0	0	0	0
25	Wendy	North	0	0	0	0	0	0	0	0	0
26	Xavier	North	0	0	0	0	0	0	0	0	0
27	Yvonne	North	0	0	0	0	0	0	0	0	0
28	Zoe	North	0	0	0	0	0	0	0	0	0
29	Adam	North	0	0	0	0	0	0	0	0	0
30	Bella	North	0	0	0	0	0	0	0	0	0
31	Carl	North	0	0	0	0	0	0	0	0	0
32	Dora	North	0	0	0	0	0	0	0	0	0
33	Eli	North	0	0	0	0	0	0	0	0	0
34	Fiona	North	0	0	0	0	0	0	0	0	0
35	George	North	0	0	0	0	0	0	0	0	0
36	Helen	North	0	0	0	0	0	0	0	0	0
37	Ian	North	0	0	0	0	0	0	0	0	0
38	Jessica	North	0	0	0	0	0	0	0	0	0
39	Kenneth	North	0	0	0	0	0	0	0	0	0
40	Laura	North	0	0	0	0	0	0	0	0	0
41	Mark	North	0	0	0	0	0	0	0	0	0
42	Nora	North	0	0	0	0	0	0	0	0	0
43	Oscar	North	0	0	0	0	0	0	0	0	0

The screenshot displays a Microsoft Word 2010 window with a document titled "Document1 - Microsoft Word". The ribbon is set to the "Formulas" tab, showing the "Table" group. The document contains a large table with 10 columns. The table is organized into several sections, each with a subtotal row. The sections are: "Wing Subtotal", "Climax", "Climax-RES", and "Climax Subtotal". Each section contains multiple rows of data, with the first row of each section being a header row. The "Wing Subtotal" section has 10 rows of data. The "Climax" section has 10 rows of data. The "Climax-RES" section has 10 rows of data. The "Climax Subtotal" section has 10 rows of data. The table is formatted with bold text for the section headers and subtotals. The status bar at the bottom of the window shows "Page: 1 of 1", "Words: 1", and the date and time "12/27/10 4:53:33".

The screenshot shows a web browser window with the following details:

- Page Title:** Eligibility Report
- Address Bar:** http://www.eligibilityreport.com/EligReport.aspx?...
- Page Content:**
 - Section:** Eligibility Report
 - Date:** Friday, April 18, 2014
 - Table 1 (TEAM 7):**

ELIGIBLE	Elig Date	End Date	OD	ASD
Yes	3/3/2014			3/22/2014
Yes	3/22/2014			3/22/2014
Yes	3/22/2014			5/24/2014
No				3/22/2014
Yes	3/24/2014			3/24/2014
Yes	5/9/2014			5/9/2014
Yes	5/9/2014			5/21/2014
Yes	11/26/2013			11/26/2013
No				3/21/2014
	3/2/2014			3/2/2014
	4/25/2014			4/25/2014
Yes	2/28/2014			2/28/2014
 - Table 2 (TEAM 8):**

ELIGIBLE	Elig Date	End Date	OD	ASD
	4/9/2014			4/9/2014
	11/4/2013			10/26/2013
	3/26/2014			3/26/2014
	3/26/2013			3/26/2013

- *Weekly in team supervision (clinicians included)
- *Weekly Individual and Group Supervision
- *Weekly in MH/ Wrap integration meeting
- *Monthly in Director/ Regional integration meeting

***Monitoring**

- *Made in weekly supervision
- *"Role Meetings"
- *Clinical Group Supervision
- *All Staff Meetings
- *Individual Supervision when necessary

***Integration, Forecasting, "Tinkering"**

An employee's motivation is a direct result of the sum of interactions with his or her manager.

- Bob Nelson

Customers will never love a company until the employees love it first.

- Nelson Clark

"We are what we repeatedly do. Excellence then, is not an act, but a habit."

-Aristotle

TREAT EMPLOYEES LIKE THEY MAKE A DIFFERENCE AND THEY WILL.

6679

*** The Right busses with folks in the right seats**

*** “The strength of the team is each individual member. The strength of each member is the team.”**
 – Phil Jackson

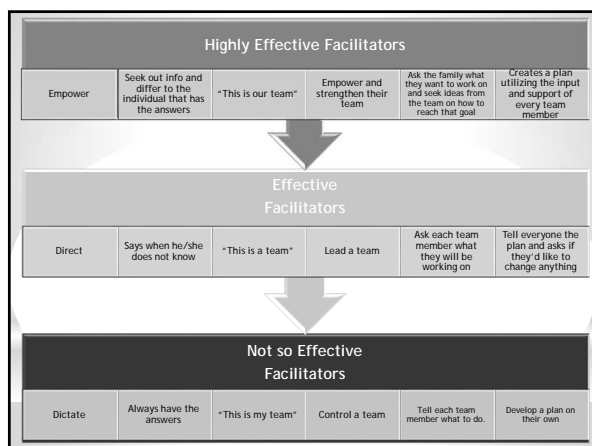
We focusing on hiring staff who...

- Can think critically and abstractly.
- Are team-based in their thinking and work style.
- Have a *need* to learn.
- Continuously seek out feedback.
- Embrace evolutions.
- Use question orientated communication as opposed to directive driven.
- Focus on solving problems not personalities.
- Apply a “how can I help” attitude.
- Seek multiple sources of information before landing on a course of action.
- Lead through influence rather than authority.
- Value life experience of other roles and incorporate that info into their decision making.
- Teach, not tell.

*** “Big Ideas” on Effective Teams**





- * Success and failure is achieved as a team.
- * An effective teams serves their families *and* one another.
- * An effective team sets aside time to be *creative* and to be *productive*.
- * An effective team may have their own rituals, rewards and ceremonies.
- * An effective team has honest conversations without anger or resentment.
- * An effective team has a desire for continual improvement in what they do and who they are.



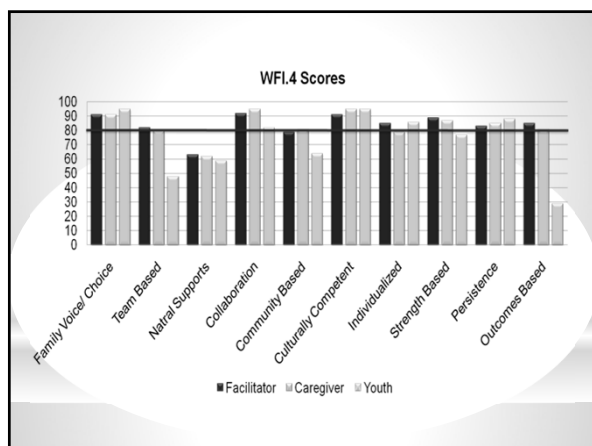
*Leadership Dynamics

- Program policies are developed collaboratively.
- Decision making related to case direction involves input from Wrap and MH.
- Courses of action are developed after joint discussion.
- Management of staff is left to each director's own program.
- Yielding in front of supervisors/ staff may sometimes be necessary.
- Co representation of programs at all staffs is important.
- Language used when discussing teams is critical.





*Outcomes



***Global Assessment of Functioning**

The average GAF score upon intake for our children is 46 (severe impairment).

The average GAF score upon discharge is 53 (moderate impairment).

Since 2007 83% of the children we worked left with GAF scores that were the same or higher.

0 of the children's GAF scores decreased.

36% of those kids improved by jumping an entire level.

***Child and Adolescent Functioning Assessment Scale**

*Average CAFAS score upon intake is 116 (marked impairment)

*Average CAFAS score upon discharge is 84 (moderate impairment)

*75% of the children's scores stayed the same or improved



***Qualitative**

- *Staff fill more fulfilled by their work
- *Cohesive program that is fulfilling the mission of your agency
- *Creativity and individual investment increase
- *Turnover decreases
- *Other agencies and public entities take notice
- *Philosophy becomes practice


***Peripheral but Equally Important**

***A few things we've learned...**



- * Standard procedures for managing conflict are helpful.
- * Hire staff who are dynamic in their thinking.
- * Team based attitudes, humility and a desire to learn are key.
- * Program Directors are deliberate (Proactive vs Reactive)when/ how they respond.
- * Systems to exchange information are critical... supervision, staff meetings, emails.
- * Sups must monitor and manage systems.
- * Feedback must be consistent, ongoing and genuine.
- * Leadership with practical experience is key.
- * Coaching, feedback and discipline must happen quickly.

We're done.



Questions?
