

Organizational Factors Facilitation Guide

Thank you for facilitating this discussion of the organizational factors (including CQI and program evaluation) that will contribute to the successful implementation of the California Child Welfare Core Practice Model. This guide will provide step by step directions for facilitating regional break-out discussions on the organizational factors.



Session Goal

Our goal for this facilitated conversation is to ensure that we have considered the factors, infrastructure, tools and resources counties will need for implementation. Participants will review the organizational culture and climate characteristics identified as necessary for implementing and sustaining the model and give feedback about whether or not we are headed in the right direction and what resources will be needed for implementation. We do not expect to reach full consensus in this session, but will make note of recommended additions and deletions for consideration by the Design Team after the convening.

Participants

Although the break-out sessions are structured for regional work, you may have additional stakeholders in your breakout group (Parent Partners, youth, mental health partners).

Timing

You will have 2 hours and 15 minutes for this activity.

Instructions

1. Identify a time keeper. There are three parts to this activity, each with a different recommended time (see below).
2. Identify a note taker. Provide the Organizational Factors Worksheet to the note taker.
3. Engage the group in Activity 1 **Organization Culture and Climate** (60 minutes):
 - a. Provide the Organization Factors Worksheet to the group and review the organizational culture and climate characteristics together. As you review, ask the group to provide feedback on the characteristics. Ask, "Are we on the right track? Are these the factors we should be focusing on?" and "What is here that shouldn't be here?" and "What have we missed?" After you have reviewed the characteristics, eliminated unnecessary factors, and added any that were missing, move on to the next part of Activity 1, a discussion of resources.
 - b. Ask the group to think about the structural and financial resources they would need to ensure their county had the organizational culture and climate characteristics to implement and sustain the model. Resource discussions can be challenging and get quickly out of hand due to overambitious planning or underestimating need, but frame the discussion as a reality based exploration of what counties will need to support implementation.
4. Engage the group in Activity 2 **Infrastructure** (45 minutes):
 - a. Turn the conversation to organizational infrastructure. Ask the group to review the Infrastructure characteristics in the Organizational Factors worksheet and provide feedback. Ask them to think about what structures they will need to support the organizational culture and climate characteristics.
 - b. Ask the group to think about the resources they will need to support the structural changes they outlined. Encourage them to think beyond financial resources and consider how statewide structures might need to change to support their own infrastructure changes.
5. Engage the group in Activity 3 **CQI and Program Evaluation** (30 minutes):

- a. Ask the group to review the CQI and program evaluation characteristics in the table below and discuss how the CQI system and other program evaluation efforts can be aligned with the California Child Welfare Core Practice Model and used to reinforce implementation and measure fidelity. How can the model become embedded in outcome measures and CQI systems?
- b. Ask the counties to identify tools and resources they will need to embed the model in existing CQI and program evaluation systems. What other tools and resources will they need for implementation and fidelity monitoring?

Organizational Factors Worksheet

Region: _____ Facilitator: _____

1. Review the organizational culture and climate characteristics using the table below.

Organizational Culture and Climate	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none">• Transparency pervades organization• Openness<ul style="list-style-type: none">○ to continuous learning and reflection○ to change,○ to innovation• Expectations that workforce will<ul style="list-style-type: none">○ Have up to date knowledge to perform job○ Be responsive to families and partners and place well-being of families above agency needs• Data-driven decision making is norm• Values evidence based/informed practice• Respectful interactions at all levels• Promotion of Trauma Informed Care including ensuring that workers are emotionally healthy (not exhausted) and can manage conflicting demands and complete necessary job tasks.• Staff feel supported• Staff feel they receive the cooperation, roles clarity and resources they need to successfully perform their job duties• Staff feel they are able to accomplish many personally meaningful things in their work and treat families in a personalized way• Organizational culture and climate and related dynamics are measured routinely to understand what changes need to be made• Leaders are committed to processes that promote making changes in culture and climate in order to support best practices• There are mechanisms for actively and routinely seeking feedback from staff and partners regarding best practices supports, agency policy and system barriers, then respond and regularly update regarding action steps taken (communication).• Incorporates Trauma Informed Care values,	

Organizational Culture and Climate	What works well, what is unnecessary, what is missing
<p>principles and actions into policies, protocols and practices so that staff as well as families and partners are treated with respect.</p> <ul style="list-style-type: none"> • Provides opportunities for staff, youth, families, communities and Tribes to actively share their voice and play meaningful roles in designing and implementing all practice and systems changes. • Policies, procedures and materials align with CPM • SACWIS system and other data collection tools, forms align with CPM • Teaming is a priority and is supported with meeting rooms both in the agency and at partner agencies for meetings of teams to occur • There is private space in all offices for supervisors to have confidential conversations with staff and for staff to have confidential conversations with families • The environment of offices utilized trauma informed principles so as not to re-traumatize families and staff (have designated quiet rooms for naps, relaxation, meditation, exercise- change lighting, change color of paint to be more calming, include cultural symbols to make people feel welcome, include signs that are helpful, have inclusive bathrooms) • Organizational Communication Structures- particularly between executive teams and other teams, as well as practice teams (e.g. intake to investigation to ongoing to foster care to adoption) support the CPM in order for families to receive the full benefits of the model • Staff and case transitions are managed to support the CPM. • Examination of feasibility or desirability of vertical case management to maximize rapid movement of cases through the system, and to create a more relationship based, wholistic experience for children, youth, young adults and families. 	

Organizational Culture and Climate	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • System structures are responsive to the needs of children, youth, young adults and families being served (vs. the needs of the bureaucracy or the wishes of staff). So even if an office or county utilizes specializations, there should be enough cross training or relationship building between functions to encourage responsiveness to family questions. • Training System is strong and able to develop and disseminate materials regarding CPM • QA/CQI System incorporates CPM values, principles and behaviors into tools, measures and attempts to assess fidelity and link CPM practice behaviors in the field to outcomes • Partnerships with other nations (e.g. Tribes), agencies, communities (e.g. African American, Latina, various refugee) are established by leadership and are given information about the CPM so that they can contribute to its creation and execution (not putting the communication burden with other entities solely on front line staff). 	

2. What structural and financial resources will you need to ensure you have the organizational culture and climate characteristics to implement and sustain the model?

3. Review the infrastructure characteristics using the table below.

Infrastructure	What works well, what is unnecessary, what is missing
Characteristics <ul style="list-style-type: none"> • Policies, procedures and materials align with 	

Infrastructure	What works well, what is unnecessary, what is missing
<p>CPM</p> <ul style="list-style-type: none"> • SACWIS system and other data collection tools, forms align with CPM • Teaming is a priority and is supported with meeting rooms both in the agency and at partner agencies for meetings of teams to occur • There is private space in all offices for supervisors to have confidential conversations with staff and for staff to have confidential conversations with families • The environment of offices utilized trauma informed principles so as not to re-traumatize families and staff (have designated quiet rooms for naps, relaxation, meditation, exercise- change lighting, change color of paint to be more calming, include cultural symbols to make people feel welcome, include signs that are helpful, have inclusive bathrooms) • Organizational Communication Structures- particularly between executive teams and other teams, as well as practice teams (e.g. intake to investigation to ongoing to foster care to adoption) support the CPM in order for families to receive the full benefits of the model • Staff and case transitions are managed to support the CPM. • Examination of feasibility or desirability of vertical case management to maximize rapid movement of cases through the system, and to create a more relationship based, wholistic experience for children, youth, young adults and families. • System structures are responsive to the needs of children, youth, young adults and families being served (vs. the needs of the bureaucracy or the wishes of staff). So even if an office or county utilizes specializations, there should be enough cross training or relationship building between functions to encourage responsiveness to family questions. 	

Infrastructure	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • Training System is strong and able to develop and disseminate materials regarding CPM • QA/CQI System incorporates CPM values, principles and behaviors into tools, measures and attempts to assess fidelity and link CPM practice behaviors in the field to outcomes • Partnerships with other nations (e.g. Tribes), agencies, communities (e.g. African American, Latina, various refugee) are established by leadership and are given information about the CPM so that they can contribute to its creation and execution (not putting the communication burden with other entities solely on front line staff). • Development of an Implementation Team to direct, support, and monitor implementation efforts. 	

4. What statewide structures might need to change to support your infrastructure changes? What financial supports will be needed?

5. What resources will you need to develop and maintain an Implementation Team?

6. Review the program evaluation characteristics in the table below.

CQI and Program Evaluation Characteristics	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none">• QA system, CQI tools that align with CPM to verify fidelity and tie to outcomes as a part of Program Evaluation• Collects baseline and follow up data on<ul style="list-style-type: none">○ Readiness to change and adopt innovation○ Organizational Culture and Climate (OCC),○ Trauma Informed System,○ Understanding and execution of the CP• Measures whether CPM is practiced with fidelity• Uses case reviews in assessing CPM execution and tying those CPM behaviors to outcomes for the agency, children, youth and families• CQI and Evaluation results hold managers, supervisors and workers accountable for execution of the CPM and to see where it is and isn't working, modify if necessary or build capacity to support when necessary• CQI process ties to outcomes	

7. How can CQI system and other program evaluation efforts can be aligned with the model and used to reinforce implementation and measure fidelity?

8. What tools and resources will you need to embed the model in existing CQI and program evaluation systems? What other tools and resources will you need for implementation and fidelity monitoring?

Workforce Development Facilitation Guide

Thank you for facilitating this discussion of the workforce development activities that will contribute to the successful implementation of the California Child Welfare Core Practice Model. This guide will provide step by step directions for facilitating regional break-out discussions on the workforce development activities.



CORE PRACTICE MODEL

A Guiding Framework for Child Welfare Practice

Session Goal

Our goal for this facilitated conversation is to ensure that we have considered the recruitment, selection, onboarding, performance evaluation, training, and coaching activities needed to support implementation and sustainability of the model. Participants will review the workforce development activities identified as necessary for implementing and sustaining the model and give feedback about whether or not we are on the right track, what is missing and what resources will be needed for implementation. We do not expect to reach full consensus in this session, but will make note of recommended additions and deletions for consideration by the Design Team after the convening.

Participants

Although the break-out sessions are structured for regional work, you may have additional stakeholders in your breakout group (Parent Partners, youth, mental health partners).

Timing

You will have 90 minutes for this activity.

Instructions

1. Identify a time keeper. There are three parts to this activity and each has been allotted 30 minutes.
2. Identify a note taker. Provide the Workforce Development Worksheet to the note taker.
3. Engage the group in Activity 1 **Selection, Onboarding, and Evaluation** (30 minutes):
 - a. Provide the Workforce Development Worksheet to the group and review the selection, onboarding evaluation section. As you review, ask the group to provide feedback. Ask, "Are we on the right track?" and "Are these the activities we should be focusing on?" and "What have we missed?" After you have reviewed the activities, eliminated unnecessary activities, and added any that were missing, move on to the next part of Activity 1, a discussion of resources.
 - b. Ask the group to think about the structural and financial resources they would need to ensure their county could complete the workforce development activities identified as necessary to implement and sustain the model. Resource discussions can be challenging and get quickly out of hand due to overambitious planning or underestimating need, but frame the discussion as a reality based exploration of what counties will need to support implementation.
4. Engage the group in Activity 2 **Education and Training** (30 minutes):
 - a. Turn the conversation to education and training. Review the education and training section of the worksheet. As you review, ask the group to provide feedback. Ask, "Are we on the right track?" and "Are these the activities we should be focusing on?" and "What have we missed?" After you have reviewed the activities, eliminated unnecessary activities, and added any that were missing, move on to the next part of Activity 2, a discussion of resources.
 - b. Ask the group to think about the resources we will need as a state to ensure we have a well-educated and trained workforce. Encourage them to think beyond financial resources and consider how statewide structures might need to change to support workforce development.
5. Engage the group in Activity 3 **Supervisory Coaching Capacity** (30 minutes):
 - a. Review the supervisory coaching capacity section of the worksheet. As you review, ask the group to provide feedback. Ask, "Are we on the right track?" and "Are these the activities we should be focusing

on?” and “What have we missed?” After you have reviewed the activities, eliminated unnecessary activities, and added any that were missing, move on to the next part of Activity 3, a discussion of resources.

- b. Ask the counties to identify tools and resources they will need to build supervisory coaching capacity to support model implementation and fidelity. What other tools and resources will they need for implementation and fidelity monitoring?

Workforce Development Worksheet

Region: _____ Facilitator: _____

1. Review the selection, onboarding, and evaluation activities using the table below.

Selection, Onboarding, and Evaluation	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none">• HR and internal agency selection and hiring procedures align with getting the people best suited to carry out the CPM.• Use of evaluation procedures that align with selecting and keeping the right people.• Use of the best practices in interviewing (e.g. use of a panel of interviewers including pertinent partners , use of a set of standardized behavioral interviewing questions for candidates applying for the same types of positions, use of in-basket tasks like role plays, decision making scenarios, sorting cases into priorities for action in order to assess skills of engagement, critical thinking, communication, working under pressure, etc.)• Value choosing staff with attributes and skills needed for staff to enact the CPM with fidelity. In addition to testing and screening for Child Welfare knowledge and skills, testing and screening for<ul style="list-style-type: none">○ Cultural competency and humility○ Openness to EBP○ Openness to learning• Attributes and skills needed for staff to enact the CPM w/ fidelity• Engage HR in conversations about how to manage risk, unions and other legal barriers to making changes in evaluation forms so as to incorporate CPM principles and practices in them for alignment purposes.• Evaluation begins to include staff adoption of values and principles of CPM and TIC• Front line workers begin to embed CPM and TIC (trauma-informed care) values, principles and behaviors in daily practice with families while following all policies and procedures efficiently and effectively• Supervisors ensure that front line workers are aware of strengths and areas for growth in use of CPM so as to ultimately enact CPM with fidelity to reach positive client outcomes.	

2. What structural and financial resources will you need to ensure you have the selection, onboarding and evaluation activities in place to support the model?

3. Review the education and training activities using the table below.

Education and Training	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • Incorporates theoretical underpinnings, values, principles and behaviors of CPM in MSW Programs and other Pre-Service Educational Programs that may arise. • Incorporates theoretical underpinnings, values, principles and behaviors of CPM in Pre-Service and In-Service Training • Incorporates values of Trauma informed care (TIC) in MSW programs, Title IV-E Programs, pre-service and in-service training. • Includes training on all aspects of CPM including but not exclusive to key skills in teaming, cultural humility, conducting critical conversations, engaging resource parents, advocacy, tools for enhancing permanency, how to help families and youth develop support networks, etc. • Front line workers are trained in very specific information about the CPM behaviors and how adherence to the CPM will be measured • Front line workers are coached to embed CPM and TIC in daily practice with families • Front line workers are training in how to follow policy and procedures tied to CPM- • Front line workers are trained/coached to manage time so that can have the time to truly engage families and communities while also meeting policy expectations 	

4. What resources we will need as a state to ensure we have a workforce prepared to implement and sustain the practice model?

5. Review the supervisory coaching capacity activities using the table below.

Supervisory Coaching Capacity	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none">• Open and committed to and knowledgeable about CPM• Incorporates principles of CPM• Knows how to use a case consultation tool that supports workers in understanding and practicing CPM and how to continue to support CPM to ensure fidelity and get to outcomes• Involves front line staff in CQI process for feedback about what works and barriers.• Treats workforce with respect so that they will in turn treat families, other staff and partners with respect.• Support staff to prevent STS, burnout (includes flexibility).	

6. What tools and resources will you need to build supervisory coaching capacity to support model implementation and fidelity?

Services and Supports Facilitation Guide

Thank you for facilitating this discussion of the services and supports for families and caregivers that will contribute to the successful implementation of the California Child Welfare Core Practice Model. This guide will provide step by step directions for facilitating regional break-out discussions on the services and supports.



CORE PRACTICE MODEL

A Guiding Framework for Child Welfare Practice

Session Goal

Our goal for this facilitated conversation is to ensure that we have considered the internal supports, caregiver services and supports, and the external supports needed to sustain the practice model and ensure it has a positive impact for families, children, youth, and young adults. Participants will review the services and supports identified as necessary for implementing and sustaining the model and give feedback about whether or not we are on the right track, what is missing and what resources will be needed for implementation. We do not expect to reach full consensus in this session, but will make note of recommended additions and deletions for consideration by the Design Team after the convening.

Participants

Although the break-out sessions are structured for regional work, you may have additional stakeholders in your breakout group (Parent Partners, youth, mental health partners).

Timing

You will have 90 minutes for this activity.

Instructions

1. Identify a time keeper. There are three parts to this activity and each has been allotted 30 minutes.
2. Identify a note taker. Provide the Services and Supports Worksheet to the note taker.
3. Engage the group in Activity 1 ***Internal Supports*** (30 minutes):
 - a. Provide the Services and Supports Worksheet to the group and review the section on internal supports. As you review, ask the group to provide feedback. Ask, "Are we on the right track?" and "Are these the internal supports we should be focusing on?" and "What have we missed?" After you have reviewed the internal supports, eliminated unnecessary supports, and added any that were missing, move on to the next part of Activity 1, a discussion of resources.
 - b. Ask the group to think about the structural and financial resources they would need to ensure their county had the internal supports to implement and sustain the model. Resource discussions can be challenging and get quickly out of hand due to overambitious planning or underestimating need, but frame the discussion as a reality based exploration of what counties will need to support implementation.
4. Engage the group in Activity 2 ***Caregiver Services and Supports*** (30 minutes):
 - a. Turn the conversation to caregiver services and supports. Ask the participants to think about what caregivers will need to support the model.
 - b. Ask the group to think about the resources they will need to support caregivers.
5. Engage the group in Activity 3 ***External Supports*** (30 minutes):
 - a. Ask if we are on the right track, if these are the external supports we should be focusing on and what we may have missed. After you have reviewed the external supports, eliminated unnecessary supports, and added any that were missing, move on to the next part of Activity 3, a discussion of resources.
 - b. Ask the counties to identify tools and resources they will need to find or build the external supports they identified.

Services and Supports Worksheet

Region: _____ Facilitator: _____

1. Review the internal supports using the table below.

Internal Supports	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none">• Caseload size supports CPM• Staff are supported to help manage workload• There is easily accessible information about community resources• Staff are given access to social media• Staff are given access to latest technology• Well-maintained equipment (cars, etc.)• *Multiple language translations are available• *Family-friendly visitation services are available• *Availability of cultural brokers• *Availability of youth ambassadors• *Access to after-care services• *Access to parent partners	

*May be internal and external.

2. What structural and financial resources will you need to ensure you have these internal supports in place to support the model?

3. Review the caregiver services and supports using the table below.

Caregiver Services and Supports	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none">• Caregivers and resource parents understand the CPM and TIC values, principles and behaviors• Caregivers act as members of the family's team• FFA and Group Home Administrators support caregivers and staff in understanding the CPM and acting as members of the family's team.• Leaders ensure there is extensive training for resource parents on childhood development, effects of abuse and neglect and other trauma	

Caregiver Services and Supports	What works well, what is unnecessary, what is missing
<p>on child behavior, etc.</p> <ul style="list-style-type: none"> • Leaders ensure there are adequate supports in place (e.g. respite care, follow up from workers tasked with supporting caregivers and resource parents) to support caregivers and resource parents. 	

4. What structural and financial resources will you need to ensure you have the caregiver services and supports in place to support the model?

5. Review the external supports using the table below.

External Supports	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • Court system (judicial officers, attorneys, GALs, and CASAs) understand CPM, TIC values, principles, components, elements and behaviors. • System partners (e.g. Mental Health, Substance Abuse Treatment, Health, CalWORKS) understand and support the CPM, TIC values, principles, components, elements and behaviors. • Agencies with a contract with CW agencies also engage in practices congruent with the CPM and TIC. • Community partners collaborate to create better ways for families to access services (e.g. one stop centers with multiple providers). • Partners are trained in CPM and TIC principles. • Coordinate TIC training with local mental health. • *Multiple language translations are available • *Family-friendly visitation services are available • *Availability of cultural brokers • *Availability of youth ambassadors • *Access to after-care services • *Access to parent partners 	

*May be internal and external.

6. What resources and tools will you need to find and build the external supports needed to support the model?

Leadership Characteristics Facilitation Guide

Thank you for facilitating this discussion of the leadership characteristics that will contribute to the successful implementation of the California Child Welfare Core Practice Model. This guide will provide step by step directions for facilitating **affinity based** break-out discussions on the leadership characteristics.



CORE PRACTICE MODEL

A Guiding Framework for Child Welfare Practice

Session Goal

Our goal for this facilitated conversation is to ensure that we have considered the leadership characteristics needed at all levels of leadership within the organization to support the model. Participants will review the leadership commitments, knowledge, and skills for all levels of leadership (directors, managers, supervisors, and line staff and give feedback about whether or not we are on the right track, what is missing and what resources will be needed for implementation. We do not expect to reach full consensus in this session, but will make note of recommended additions and deletions for consideration by the Design Team after the convening.

Participants

This session is intended for affinity groups, so you will be working with groups of executive leadership, middle managers, supervisors, or caseworkers. Although the break-out session is structured for these groups, you may have additional stakeholders in your breakout group (support staff, Parent Partners, youth, mental health partners).

Timing

You will have 1 hour and 45 minutes for this activity.

Instructions

1. Identify a time keeper. There are four parts to this activity. Timing will differ for different groups as they may take more time with their own classification. The timekeeper should keep the facilitator updated as to the remaining time.
2. Identify a note taker. Provide the Organizational Factors Worksheet to the note taker.
3. Please note that facilitators may choose to complete these reviews in a different order. For example, each affinity group may choose to review their own classification first. They are listed here in order from Executive Leadership to Caseworker.
4. Engage the group in Activity 1 **Executive Leadership**:
 - a. Provide the Leadership Characteristics Worksheet to the group and review the executive leadership commitments together. As you review, ask the group to provide feedback on the commitments. Ask, "Are these the commitments we should be focusing on?" and "What have we missed?" After you have reviewed the commitments, eliminated unnecessary ones, and added any that were missing, move on to the next part of Activity 1, a discussion of knowledge and skills.
 - b. Ask the group to review the executive leadership knowledge and skills together. As you review, ask the group to provide feedback on the knowledge and skills. Ask, "Are these the knowledge and skills we should be focusing on?" and "What have we missed?" After you have reviewed the knowledge and skills, eliminated unnecessary ones, and added any that were missing, move on to the next activity.
 - c. Ask the group to consider what resources might be needed to support developing and sustaining these commitments, knowledge, and skills.
5. Engage the group in Activity 2 **Middle Managers**:
 - a. Review the middle manager commitments together. As you review, ask the group to provide feedback on the commitments. Ask, "Are we on the right track?" and "Are these the commitments we should be focusing on?" and "What have we missed?" After you have reviewed the commitments, eliminated

unnecessary ones, and added any that were missing, move on to the next part of Activity 1, a discussion of knowledge and skills.

- b. Ask the group to review the middle manager knowledge and skills together. As you review, ask the group to provide feedback on the knowledge and skills. Ask, "Are these the knowledge and skills we should be focusing on?" and "What have we missed?" After you have reviewed the knowledge and skills, eliminated unnecessary ones, and added any that were missing, move on to the next activity.
- c. Ask the group to consider what resources might be needed to support developing and sustaining these commitments, knowledge, and skills.

6. Engage the group in Activity 3 **Supervisors**:

- a. Review the supervisory commitments together. As you review, ask the group to provide feedback on the commitments. Ask, "Are we on the right track?" and "Are these the commitments we should be focusing on?" and "What have we missed?" After you have reviewed the commitments, eliminated unnecessary ones, and added any that were missing, move on to the next part of Activity 1, a discussion of knowledge and skills.
- b. Ask the group to review the supervisory knowledge and skills together. As you review, ask the group to provide feedback on the knowledge and skills. Ask, "Are we on the right track?" and "Are these the knowledge and skills we should be focusing on?" and "What have we missed?" After you have reviewed the knowledge and skills, eliminated unnecessary ones, and added any that were missing, move on to the next activity.
- c. Ask the group to consider what resources might be needed to support developing and sustaining these commitments, knowledge, and skills.

7. Engage the group in Activity 4 **Caseworkers**:

- a. Review the caseworker leadership commitments together. As you review, ask the group to provide feedback on the commitments. Ask, "Are these the commitments we should be focusing on?" and "What have we missed?" After you have reviewed the commitments, eliminated unnecessary ones, and added any that were missing, move on to the next part of Activity 1, a discussion of knowledge and skills.
- b. Ask the group to review the caseworker leadership knowledge and skills together. As you review, ask the group to provide feedback on the knowledge and skills. Ask, "Are these the knowledge and skills we should be focusing on?" and "What have we missed?" After you have reviewed the knowledge and skills, eliminated unnecessary ones, and added any that were missing, conclude this session.
- c. Ask the group to consider what resources might be needed to support developing and sustaining these commitments, knowledge, and skills.

Leadership Characteristics Worksheet

Region: _____ **Facilitator:** _____

1. Review the executive leadership commitments using the table below.

Executive Leadership Commitments	What works well, what is unnecessary, what is missing
<p>Promote:</p> <ul style="list-style-type: none"> • Being a learning organization at all levels of the organization. • Being a trauma informed organization (which includes recognizing trauma of families and staff). • Managing competing values (e.g. high productivity of staff, efficiency and engaging families). • Valuing culture as a source of strength and resiliency. • Values and principles of CPM by building consensus • Use of implementation science to install and implement CPM <p>Inspire others to engage in CPM:</p> <ul style="list-style-type: none"> • Show alignment between CPM and Organizational mission, vision, goals • Adjust priorities to support CPM • Model CPM values, principles and behaviors and recognizing the power of the parallel process • Reflect on one's own beliefs, biases, assumptions and impact on staff, partners, organizational processes and decision-making. • Run agency and work with partners in a way that is consistent with CPM • Promote a belief that families can grow and change <p>Create:</p> <ul style="list-style-type: none"> • Healthy Organizational Culture and Climate (commit to measurement and adjusting based on feedback) • Leadership at all levels of org • Change in structures to support CPM (e.g., align policies with CPM, change environment, change IT system to align, change performance measurement system to align with CPM, include CPM in CQI process). • Realign existing and advocate for more resources to support CPM. • Ensure that all managers, supervisors and workers are trained in the CPM and that all workers are coached and supported in use of the 	

Executive Leadership Commitments	What works well, what is unnecessary, what is missing
<p>CPM in daily work with families.</p> <ul style="list-style-type: none"> Honor the evaluation and self-evaluation processes that promote continuous quality improvement Evaluate the impact of the CPM on outcomes. Collaborate with allied organizations in rollout of CPM <ul style="list-style-type: none"> Public Agency partners Private Agency partners CalSWEC and the Regional Training Academies around training and coaching needs 	

2. Review the executive leadership knowledge and skills using the table below.

Executive Leadership Knowledge and Skills	What works well, what is unnecessary, what is missing
<p>Knowledge of</p> <ul style="list-style-type: none"> Communication strategies CPM and Learning Organization Processes and Tools. Implementation Science and how to apply to support and scale CPM. How to engage in a process to create readiness (for change to adopt the CPM) among managers, supervisors and staff. How to manage a change process. How to install, implement and maintain a CPM. How to manage by data. How to affirm managers and partners and organizational strengths in everyday work and interactions. How to align policies, procedures, business processes and structures (e. g. IT, CQI, Case Management Structure) with CPM. How to advocate for changes to SACWIS system and other resources. How to advocate for changes to HR How to help overcome the historical trauma, layers of trauma and institutional trauma families and communities may have experienced have impacted them How families can work with providers to address the impacts of historical trauma The signs and impact of burnout, secondary traumatic stress (STS) and vicarious trauma on staff <p>Skills to:</p>	

Executive Leadership Knowledge and Skills	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • Listen to the impact of these experiences on families and communities and acknowledge ways that the system may have contributed. • Prevent and intervene when staff experience burnout, STS and vicarious trauma by applying adaptive and technical leadership approaches in problem solving. • Explore complaints, events and situations through inquiry, listening and data to inform and implement decisions. • Engage cultural, community and Tribal partners as key advisors in local practice and systems change to advocate for and support improvements. • Implement creative fiscal management • Make change happen • Communicate value of CPM to diverse stakeholders 	

3. Ask the group to identify resources needed to develop and sustain these commitments, knowledge, and skills.

4. Review the middle manager commitments using the table below.

Middle Manager Commitments	What works well, what is unnecessary, what is missing
<p>Middle Management Leaders Commit To Supporting Executive Team on promoting and executing strategies to:</p> <ul style="list-style-type: none"> • Create a learning organization at all levels of the organization. • Create a trauma informed organization (which includes recognizing trauma of families and staff). • Manage competing values (e.g. high productivity of staff, efficiency and engaging families). • Value culture as a source of strength and resiliency. 	

Middle Manager Commitments	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • Support planning, designing and carrying out installation and implementation of the CPM. • Model CPM values, principles and behaviors and recognizing the power of the parallel process • Reflect on one's own beliefs, biases, assumptions and impact on staff, partners, organizational processes and decision-making. • Run agency and work with partners in a way that is consistent with CPM • Promote a belief that families can grow and change • Foster leadership at all levels of the organization • Help in making changes to create a healthy organizational culture and climate • Create cross-divisional teams to develop creative solutions to any problems that arise or barriers to executing the CPM. • Change structures under their control to support and create alignment with CPM. • Advocating for resources in their domain. • Ensuring that all supervisors and workers are trained in the CPM. • Supports and coaches supervisor in CPM. • Honor the evaluation and self-evaluation processes that promote continuous quality improvement and ensures fidelity to CPM • Solicit feedback from supervisors regarding CPM rollout and timeline, and take feedback into consideration when executing change. • Doing their part to facilitate the evaluation of the CPM impact on family satisfaction and outcomes. • Disseminate information about CPM and implications for practice to allied organizations and seek input from them to enhance coordination <ul style="list-style-type: none"> ○ Public Agency partners ○ Private Agency partners ○ CalSWEC and the Regional Training Academies around training and coaching needs 	

5. Review the middle manager knowledge and skills using the table below.

Middle Manager Knowledge and Skills	What works well, what is unnecessary, what is missing
Knowledge of <ul style="list-style-type: none"> • CPM and Learning Organization Processes and 	

Middle Manager Knowledge and Skills	What works well, what is unnecessary, what is missing
<p>Tools.</p> <ul style="list-style-type: none"> • Implementation Science and how to apply to support and scale CPM. • Communications strategies and their importance • How to engage in a process to create readiness (for change to adopt the CPM) among managers, supervisors and staff. • How to manage a change process. • How to install, implement and maintain a CPM. • How to manage by data. • How to affirm manager, partner and organizational strengths in everyday work and interactions. • How to align policies, procedures, business processes and structures (e. g. IT, CQI, Case Management Structure) with CPM. • How to advocate for changes to SACWIS system and other resources. • How to advocate for changes to HR • How the historical trauma, layers of trauma and institutional trauma families and communities may have experienced have impacted them • How families can work with providers to address the impacts of historical trauma • The signs and impact of burnout, secondary traumatic stress (STS) and vicarious trauma on staff <p>Skills to:</p> <ul style="list-style-type: none"> • Listen to the impact of these experiences on families and communities and acknowledge ways that the system may have contributed. • Prevent and intervene when staff experience burnout, STS and vicarious trauma by applying adaptive and technical leadership approaches in problem solving. • Explore complaints, events and situations through inquiry, listening and data to inform and implement decisions. • Engage cultural, community and Tribal partners as key advisors in local practice and systems change to advocate for and support improvements. • Implement creative fiscal management • Communicate value of CPM to diverse stakeholders 	

6. Ask the group to identify resources needed to develop and sustain these commitments, knowledge, and skills.

7. Review the supervisory commitments using the table below.

Supervisory Commitments	What works well, what is unnecessary, what is missing
<p>Supervisory Leaders Commit To:</p> <ul style="list-style-type: none"> • Allow staff to try and learn and fail and learn again. • Maintain unit's effectiveness, quality and morale during change effort. • Assess staff for STS, burnout and give support to bring relief. • Manage competing values (e.g. high productivity of staff, efficiency and engaging families). • Value culture as a source of strength and resiliency. • Support roll out of the CPM • Model CPM values, principles and behaviors and recognizing the power of the parallel process • Reflect on one's own beliefs, biases, assumptions and impact on staff, partners, organizational processes and decision-making. • Keep up to date on CPM and communicate with staff. • Promote values and principles of CPM for how to engage families and work with community partners , tribes, cultural groups to which families belong and other agency partners. • Promote a belief that families can grow and change • Advocate for resources. • Evaluate current procedures and suggest improvements to ensure success of CPM. • Ensure that all workers are trained in the CPM and that all workers are coached and supported in use of the CPM in daily work with families. • Meet with staff to generate support for CPM, plans to implement CPM, importance of staff following CPM. 	

Supervisory Commitments	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> Honor the evaluation and self-evaluation processes that promote continuous quality improvement. Use case consultation tool to ensure workers follow CPM in practice with families. Provide constructive feedback, guidance and reinforcement as workers use CPM. Make adjustments in staff assignments to promote success in CPM execution. Obtain feedback from workers regarding CPM and share with managers. Celebrate success in worker utilization of CPM and client success as a result. Encourage staff to share skills and abilities within team to facilitate learning of CPM. Participate in the evaluation of the impact of the CPM on outcomes. Collaborate with allied organizations as appropriate at their level <ul style="list-style-type: none"> Public Agency partners Private Agency partners CalSWEC and the Regional Training Academies around training and coaching needs Foster leadership in workers 	

8. Review the supervisory knowledge and skills using the table below.

Supervisory Knowledge and Skills	What works well, what is unnecessary, what is missing
<p>Knowledge of</p> <ul style="list-style-type: none"> CPM and Learning Organization Processes and Tools. Implementation Science and how to do their part in supporting CPM. How to engage in a process to create readiness (for change to adopt the CPM) among staff. How to manage a change process at the team level. How to ensure staff use CPM with fidelity. How to manage by data. How to affirm staff, partner and organizational strengths in everyday work and interactions. How the historical trauma, layers of trauma and institutional trauma families and communities may have experienced have impacted them How families can work with providers to address 	

Supervisory Knowledge and Skills	What works well, what is unnecessary, what is missing
<p>the impacts of historical trauma</p> <ul style="list-style-type: none"> • The signs and impact of burnout, secondary traumatic stress (STS) and vicarious trauma on staff. <p>Skills to:</p> <ul style="list-style-type: none"> • Listen to the impact of these experiences on families and communities and acknowledge ways that the system may have contributed. • Prevent and intervene when staff experience burnout, STS and vicarious trauma by applying adaptive and technical leadership approaches in problem solving. • Explore complaints, events and situations through inquiry, listening and data to inform and implement decisions. • Engage cultural, community and Tribal partners as key advisors in local practice and systems change to advocate for and support improvements. • Communicate value of CPM to diverse stakeholders 	

9. Ask the group to identify resources needed to develop and sustain these commitments, knowledge, and skills.

10. Review the caseworker leadership commitments using the table below.

Caseworker Leadership Commitments	What works well, what is unnecessary, what is missing
<p>Caseworkers as Leaders Commit To:</p> <ul style="list-style-type: none"> • Be open to CPM and new way of working with families. • Assess self and colleagues for STS, burnout and engage in self-care and give support when see it happening. • Value culture as a source of strength and resiliency. • Support roll out of the CPM 	

Caseworker Leadership Commitments	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • Model CPM values, principles and behaviors and recognizing the power of the parallel process • Reflect on one's own beliefs, biases, assumptions and impact on families, partners, organizational processes and decision-making. • Promote a belief that families can grow and change among peers. • Advocate for resources for self to do job and families to meet needs. • Fully engage CPM training and coaching. • Follow CPM. • Honor the evaluation and self-evaluation processes that promote continuous quality improvement. • Use case consultation with supervisor to help follow CPM in practice with families. • Accept feedback, guidance and reinforcement around CPM. • Give feedback regarding CPM to supervisor. • Celebrate client successes. • Share skills and abilities within team to facilitate learning of CPM. • Participate in the evaluation of the impact of the CPM on outcomes. • Collaborate with allied organizations as appropriate at their level <ul style="list-style-type: none"> ○ Public Agency partners ○ Private Agency partners ○ CalSWEC and the Regional Training Academies around training and coaching needs • Be a CPM champion. • Mentor new workers in CPM. 	

11. Review the caseworker leadership knowledge and skills using the table below.

Caseworker Leadership Knowledge and Skills	What works well, what is unnecessary, what is missing
<p>Knowledge of</p> <ul style="list-style-type: none"> • CPM • Implementation Science and how to do their part in supporting CPM. • How to use CPM with fidelity. • How the historical trauma, layers of trauma and institutional trauma families and communities may have experienced have impacted them 	

Caseworker Leadership Knowledge and Skills	What works well, what is unnecessary, what is missing
<ul style="list-style-type: none"> • How families can work with providers to address the impacts of historical trauma • The signs and impact of burnout, secondary traumatic stress (STS) and vicarious trauma on staff. <p>Skills to:</p> <ul style="list-style-type: none"> • Listen to the impact of these experiences on families and communities and acknowledge ways that the system may have contributed. • Prevent and intervene when co-workers experience burnout, STS and vicarious trauma by applying adaptive and technical leadership approaches in problem solving. • Explore complaints, events and situations through inquiry, listening and data to inform and implement decisions. • Engage cultural, community and Tribal partners as key advisors in local practice and systems change to advocate for and support improvements. 	

12. Ask the group to identify resources needed to develop and sustain these commitments, knowledge, and skills.
