Using Policy to Initiate Change in Systems of Care Communities
Webinar Transcript
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Gary De Carolis: Hello Everyone. This is Gary De Carolis and this is the Webinar on using policy to initiate change in Systems of Care communities. And I'm joined today with Matt Shuman from ICF international. Both of us have been members of the National Technical Assistance and Evaluation Center for Systems of Care. And we're delighted to be with you today to talk about one of our favorite topics and that's policy. Matt, would you like to say anything?

Matt Shuman: Um, no that we're just excited to talk with all of you and to talk about some new products that we have that came out that will hopefully help you and the rest of the field with policy initiatives moving forward.

Gary De Carolis: Great. Yes, a lot of our discussion today and I will lead the first half of the discussion and then Matt will pick it up midway around two products that this technical assistance center has put together recently. Mine will be a policy toolkit and Matt's will be a policy action guide. As you will see later, both of those are on the Information Gateway and are accessible to everyone. So the learning objectives that we hope to accomplish today would be to help people better understand policy options available to those working in Child Welfare and Systems of Care. And also to learn how to use the System of Care policy action guide that is on the Information Gateway website. And I should just say, if you indulge me for a second, this is the last Webinar of the National Technical Assistance Evaluation Center on Systems of Care. All those prior Webinars are also on the website along with a number of products that the center has developed over the past eight years. We've had the privilege of being a technical assistance and evaluation center through the Federal Children's Bureau and it's been an absolute honor and delight to spend those years working on this for the Children's Bureau.

So, with that, some of the questions that we hope to explore with you, and I should say too that we really want your questions as we go through this. There is a little box at the bottom right side of your screen where you can type in questions and we are actually going to stop the presentation and deal with any questions that you put out there and we really encourage you to do that. We'd love to have that back and forth and get you what you want during this time together. We hope that you will really get a sense of how to use what are and how to use the various policy options that are available to you. And also have a working understanding of the policy action guide and what that can mean for you as you think about this whole area of policy and what vehicle you

may want to use to best fit your situation. And how do you organize itself to develop a policy? It's a …most policies are really a marathon run and not a sprint and it takes a lot of strategic thinking to get to where you want to be and we'll hopefully outline some of those steps in the next few minutes here.

So all of our work, over the last eight years, has been based on these Systems of Care principles which I should say are closely aligned with the Child and Family Service Review practice principles that many of you know. They kind of speak for themselves so that partnering with children, youth and families, being culturally and linguistically competent in the work that we do, children are best served in the context of their home and community, individualizing care and coming from a strength based approach is the best way to bring out the best in children and families. No one agency can do this work by itself and it's really the inner agency collaboration and intra-agency within the child welfare agency bringing all those players together with them you have a shot at making it work and then being accountable for whatever we put out there. That we collect data, we set some benchmarks for our work and see how we do meeting them, and why not, and if so what needs to be the next set of benchmarks to move forward. But those are the principles that have been in that field for a long time and certainly are very applicable to our work in Child Welfare.

The technical assistance and evaluation center created a monograph on the infrastructure of a System of Care. These are the nine elements of that infrastructure. After that monograph was written it was decided that we should really build toolkits around each of these components. And so there are nine toolkits, they are on the website that we will show you soon, Information Gateway Website, under Systems of Care there are a number of products there. Obviously today we are going to focus on policy as one of those nine. The way the toolkits were built was to interview a number of people in the nine grant communities of the improving Child Welfare outcomes through Systems of Care grant program. As well as collecting information data on how those nine went about doing their work. As I go through the toolkit you'll see some of the actual quotes that some people in the field in those grant communities gave us and really we built these toolkits around as much practice as possible other than the theory alone.

So the agenda looks something like this. And we'll start with the definition of policy, key partners, the four phases from pre-planning to implementation to making sure there is a continuous quality improvement phase to all of the work around policy. And then you'll see here where Matt comes in with the policy action guide, sustainability tips, some other resources for you, and then lastly for more information where you can go. You'll notice the stars on the right side of this slide. Those are actually places where we will stop the conversation and open it up for questions. If we have some, terrific, if not, we'll just move forward. Within each of those phases, so you'll see also the activities and wisdom shared. Now under each phase, in each of those toolkits, and this one in particular in policy, there are a number of activities. Just for the economy of time and scale, I picked one of those activities to list for our conversation today. But just know if you go into that toolkit you are going to see a range of activities within each of those phases. And also a number of quotes from people related to that particular phase as well. I pulled out one quote, which I think might be salient for our discussion today but there's a lot more in the actual tool kit then what you are actually going to see today so I encourage everyone to take a look at that. They're chock full of information and what's not in here too that's in the

toolkit are a set of products and resources that the grantees created around each of those toolkit topics. And those aren't listed in here at all but there are all kinds of information, like a memorandum of understanding, legislation that was drafted, proclamations from the governor that were created. All those are actually built into the toolkit and accessible to you. So you don't have to reinvent the wheel if you are thinking about an interagency agreement or memorandum of understanding or even a governor's proclamation on a Child Welfare driven System of Care. We have examples of those all at your fingertips in those toolkits. So, just for your information.

Okay let's start off with this definition. And I think that the take-away for me here is that policy can mean a number of different things and in many cases you start with one type of policy, for example, an interagency agreement might be where you start but as you move through time and as you enter what that agreement said what it was going to do you might want to move to another level of policy which could be a regulation, it could be a statute, so it could be a number of things. The key is that what you start with today doesn't have to be where you end up down the road. But you can decide to start at something that's doable and it might be an interagency agreement or whatever and then as time goes on and you really build some legitimacy around that particular policy it might be ready for the next level of policy and Matt's guide is a great way to assess where you need to be with all that and help you out in determining where you start and what you move towards down the road. But it's a great tool policy in general to help sustain your work which many of you start your work on systems change activities with a grant whether it's a federal grant, foundation grant and so you've got a three to five year window many times to do something. Well one way to help to continue that work beyond the life of that grant is to think about what are the policy pieces, where are the pieces that we can turn into policy that will sustain the work beyond the life of any federal or private foundation grant.

So some key partners here in the work of Systems of Care of course you want an interagency committee, you want family representation, administrative support staff, and you can see all the different players that could be involved. I can remember in Vermont when we first started our System of Care legislation, today it's called Act 64, it's been in operation for over 20 years now. We had a House member and a Senate member be part of the drafting committee and they never could come to the meetings actually because they're too busy but having them receive the minutes and having them be part of the process when it was ready to actually go to the legislature for action those were the two key sponsors because they were intimately familiar with what we were doing and so it does, I would suggest, if you can, to think about involving at whatever level whether it's a staff person of those legislatures or a legislature them self having them involved even if it's just tangential even if it is just a matter of them saying yes and you sending minutes and leaving it at that. Another key player here, in my mind, is the evaluation staff which will bring the data underneath some of what you're doing to the table and can be very powerful information in the whole process of building your case for the particular policy that you want to move forward with. So having them involved from the beginning I think can be very helpful down the road as you move forward.

So let's go into the phases here. First, pre-planning and the example or the activity that I put out for you is that before you go too far into anything like, creating policy, do an environmental scan. For example you could do a Lexus Nexus search, it's a great tool for gathering information

around policy. A couple years ago when we did it we found 18 states had some form of Child Welfare System of Care legislation, for example. You know if you look at those, there might be things that you can pull from a number of them to help build your draft policy but you know there's no reason why not to take from others who may have moved forward on this before you did. Beg, borrow, and steal as they say. It can be very helpful and actually can open you up to ideas that you might not have thought about doing. So I really encourage everyone to think about, especially with the internet today, take advantage of what's out there as you think about what you might want to do.

And then the quote for this phase. There are a couple of salient pieces here. One is building relationships. Obviously in this case, with Systems of Care work, it is interagency relationships. It's getting families to the table to talk about how the policy would benefit them and things to think about as you build policy. I found family members come from a vantage point that as sensitive as we may be to youth and families, they're going to say things that we're going to miss and having them at the table can really make a good policy, a great policy. And then you'll see later on here that this particular, this is in New York City, Bedford-Stuyvesant Community where they started with a memorandum of understanding as an early form of policy, in a sense that kind of sets them loosely defined rules of engagement and eventually they went to a more formal contract but the memorandum allowed them to put this all down on paper and get an understanding of how they're going to relate to each other, test it out for a year and most entering agreements, a memorandum of understanding I would recommend not be for more than one year before they're renewed so you're not tied to something that might not be working very well. And then you can relook at it. And then they moved onto a contract once they saw what they had put down was working and I'm sure they tweaked it some as it went into a more formal contract. But those were two key pieces. The final one was patience and persistence. When you're starting something new like this, building policy out of nothing there may not have been any policy before. It takes time, it takes some awkward moments when all the players may not be on the same page with you and it just takes some time and understanding and working through the bugs to really get this to where it needs to be as the support of all the players at the table. And you really want to try to build towards consensus in this case because it's the product that will move onto the future with you. And another key piece here would be that you might want to bring someone from another community that has this policy in place already to talk about the benefits of having it and what it has served for them. Again, someone that's a little bit ahead of where you are, take advantage of that and use that. We certainly did that a lot when we were first thinking about our policy here in Vermont.

Before I go any further, in this pre-planning phase let's stop for a second and anything before that. Are there any questions? This is your chance to type something in on the bottom there and we'll be glad to field it with you.

I'm hoping everybody knows how to do that. I'll give you one more minute. There's a bonus or a prize for the first question that we get by the way. You get a thumb-drive from the TA and Evaluation Center. All this material, on one thumb drive. Okay, I'm going to move forward. If you do have a question I'm watching the screen and if it pops up we'll handle it.

So next phase is planning. So we've gone from pre-planning to planning. Now we're getting closer to actually doing something but planning is very important early on. So here, the example of many activities listed in the planning phase, I listed the one identifying policies that impeded implementation. You want to know what policies are out there that are actually going to take away from the policy you're thinking about. Let me give you an example. In North Dakota there was a time two years ago where the Department of Education had a policy where they would pay three or four times the per pupil cost for a child to be served outside their home community and only the per pupil cost for the child being served in their school district.

Well if you're building a community based system of care if the incentive is to send children out of the district, it's not going to bode well for your new policy that might be trying to create a community based System of Care. So that had to be dealt with. They had to work on changing where the incentives in their current policies were to support the work of their System of Care that was being designed. It's things like that. So you want to know where they are and work on trying to alter those or change those and in some cases maybe even do away with policies that are no longer relevant to the work you're trying to do today. And I think this piece takes constant review because things change so fast in our work that it's always a good thing to take a look at what are the standing policies that we're operating under and are they getting us the results that we want or not.

So in the planning phase the quote that I put down here is around North Carolina, Alamance County, creating a memorandum of understanding and it helped, in their mind, it helped them put things in place so that when some of the leaders, the early leaders of their system of care work left they would still be able to go on. They had something more than a charismatic leader. They had some, an actual formal memorandum of understanding and I've seen this one in particular and they have a good twenty players that have signed off on this and they do it every year and they tweak it every year and it's a very alive document and it's supported by all the county stakeholders in their system including families. So again, I am going to stop here and if there are any questions about the planning phase this would be a good time to type in a question. I hope you can do that. You should be able to. Under that box on the bottom right side of your, that little screen that you have on the right.

Let's move on. Now we're into the implementation phase. This is where the rubber hits the road. This is when you actually create the executive orders, legislation, statutes, interagency agreements, policy and procedures, memorandum of understanding, or governor mandates. This is, you know, you've kind of done you're environmental scan, you've looked at the disincentives, now you're at a point where you are actually drafting some of this. Matt's going to talk to you about some of the different levels of do ability of implementing these things because they do, some are easier to implement than others. I'll leave that for Matt to talk about. And the quote that I listed here is "be patient". It does take a lot of time and repetition and what you're trying to do and why you are doing it, why are we creating this policy. People need to hear that many different ways as you go through this. And you know, towards the bottom of that quote this is another very important piece here that you'll need someone that is going to take the lead in this that is going to do a lot of the drafting. So you'll have players come to the table but someone's going to have to be the glue to pull it all together. Take the minutes. Make sure the minutes are taken, that the drafting is done, the changing, you'll go through many many drafts

before you get something that everyone will support and that's part of the patience. To be open to that, to hear what people have to say and why they think something should be a little different or a lot different. Just know that it is going to take 10, 15, maybe even more drafts to get it to where you need to be. Okay, any questions on the implementation phase? Again, there are a whole set of activities that are not listed here as well as a number of different quotes that feature different aspects of the work the people were doing out in the field.

And then the fourth phase is continuous quality improvement. This is making sure that what we do, that it's doing what we hoped it would do. And the activities I have here make sure that you've invited your evaluators to be at the table in the development of any new policy that you're thinking of. And also making sure that the policy that you're thinking about has some outcome measures built into it and that you have a tracking mechanism to see if in fact you are getting what you hoped to get when you thought about creating this policy. You know many times we think we're doing the right thing and we hope we're going to get the results that we wanted to but there are so many variables and factors that come into play that we need to keep track and if we're on track that's terrific and after a year I always recommend that people take a look at some of this data they're getting from the policy that they created to see what needs to be changed or what new benchmarks need to be in place to keep us growing as we've gone ahead with what we're doing. Thoughts?

Okay, let me go to the quote here. And this gives an example. Their Interagency Oversight Committee, this is in Jefferson County, Colorado, came up with four goals that they wanted to work on for that year. So they established benchmarks, percent increases or decreases were developed and this is where they were able to evaluate the work that they were doing. And Jefferson County, actually Colorado in general has a public law that touches all the counties for Child Welfare and all their partners, that's pretty comprehensive. Again, that would be a nice [inaudible] for someone. In fact, it's in the policy toolkit is that statute that has a requirement that they create these goals and benchmarks on a year to year basis. When those benchmarks are met there is actually some financial incentives for them to meet those benchmarks and get some funds from the state to continue going. So it's a great piece of legislation.

Okay, I'm going to turn this over to Matt now. And the Policy Action Guide.

Gary De Carolis: You hit your arrow keys, you should have control of it, it looks like. Maybe I do still. But we can do this until that last slide, Matt. Then you can take over.

Matt Shuman: Okay, that's fine. In order to show them the tool I definitely need to have control.

Okay, but for this part of the Webinar we're going to discuss the Policy Action Guide which is a new tool that the TA and Evaluation Center just developed and went live two weeks ago on September 1st and it really just compliments the Policy Action Toolkit that Gary's been talking about and pulling a lot of these slides from and it's a way of giving some more actual items and helping guide the user through the process and just taking those concepts and really pushing them along even further and so for this part of the presentation I am going to talk about what the Policy Action Guide is, who the intended audience is, what's included in the guide and then how

do I use it. It'll give you a walk through of the guide. I'll show you the features and what's available. You can go to the next slide, Gary.

So in terms of what the policy action guide is, it's a tool that supports the process of identifying and advancing policy strategies to improve Child Welfare Systems and practices. We really wanted this to be something that could help users. Help professionals in the field assess their policies including the gaps- what's already there, what's needed- to select a policy approach that's applicable and appropriate for what they're trying to do and then develop next steps to implement that approach and try and enact that policy and get it incorporated into their Child Welfare System. And one of the key components because we want something that could be used collaboratively amongst all the partners so we've added forms that users can download and that way they can input information into them and then share them with various partners to have them review it or provide input or make it a group effort and really get everyone involved. I think that's one of the main characteristics of Systems of Care that you want all stakeholders to be participating and getting as much information as possible to make it the most holistic product that you can. And we can go on to the next slide.

The policy action guide focuses on five different policy approaches and these are as you know, these are not an exhaustive list of all the approaches but five of the ones that we thought might come up most often and might be applicable to the work in the Child Welfare field. We selected legislation which are laws enacted by a legislature such as Congress of your State, General Assembly, regulations which basically outline how an executive agency is going to implement legislation so how U.S. Department of Health and Human Services are going to implement a salient connection with this legislation or how your local legislature or sorry your local HHS is going to implement a state piece of legislation. There are proclamations, which are generally non-binding declarations by an executive official that help raise awareness, or bring attention to an issue and those might be implemented by the president, a governor, a mayor, another legislature. There are multiparty agreements which are documents that outline how two or more parties are going to work together toward a common goal and then finally their internal policies which are the rules developed by an agency that guide its own work. And go to the next slide. The intended audience of policy action guide is really anyone seeking to improve outcomes for children, families or policy and specifically Child Welfare agencies, professionals, agency professionals from related fields so it could be people from domestic violence, substance abuse, criminal justice, education etcetera. that want to get involved in and this is also information that is applicable in any field. It's geared towards Child Welfare, the examples we talked about are Child Welfare but I think the process can be applied to any number of fields. It could also be relevant for community organizations and then existing or be developed collaborations or partnerships amongst various organizations. Go to the next slide.

I'm going to briefly go over what is included in the guide, you'll see a little bit more as I do the walk through but I just wanted to give you an idea of what to expect as we go through. The first component of the guide is the assessment. This is something that we would expect users to complete as they get going in their policy process and also I figure through the guide itself. The assessment helps users define the issues they are looking to tackle through policy. Specify the objectives, what are you trying to get at with this policy. Because I think the more specific you are in the beginning, the more tailored and more valuable your policy will be as you move

forward. It will help you review existing policies and policy gaps, and also determine factors that might support or restrict your policy. What's already in the policy environment or the social contexts where you are and how is that going to help you move forward, or what things you need to look for in order to avoid any pitfalls. And for the assessment there is a fillable PDF and Word form that you can download and as I've said before you can share that with stake holders and at least have a record too of what your thinking is at the time. And you can change that as you move forward. A policy initiative is not going to stay the same or your ideas are not going to stay the same. It's a fluid process and where you are on day one might be very different than when you get to day two, three and four and move along. We can go to the next slide.

There is a selection guide, which gives you a description of the five policy approaches we talked about earlier. It includes definitions, examples and reasons why you may or may not want to select each approach. And also in that guide is that snapshot that Gary had mentioned before where very quickly in a short table we give you, I guess, a description of each approach and sort of rate them right there against each other. For instance, first sustainability is it something that will greatly help your sustainability or is it not as strong where for instance a proclamation might be easier to enact but in terms of sustainability for the policy you're trying to enact it might not hold on as well as a piece of legislation which is much harder to change because it requires it to be enacted by the legislature and then to be signed on by the executive official. You can go to the next slide.

And finally there are the action plan forms. And we developed an action plan form for each of the approaches where we walk through what the stages and steps would be for if you were going to try to get legislation enacted or develop and internal policy etc and what you would need to do to afford that including the planning stages and moving into things you might want to consider during implementation as well. So for each of the five approaches we have these general, it might be a little different for each but we ask you to think about ways that you understand the context and process which will help you identify who should be involved including who the leaders might be and also partners you might want to involve, how to build support, steps for developing a draft, how to plan outreach or vocation strategies, things to consider for identifying resources which are both monetary and not monetary and also how you assess the results. The thing is something that is frequently left out of policy initiatives and you want to know what was the impact of what you did. It might not just be the policy itself you're also looking at the process if you're trying to enact legislation. When you look back, whether or not you were successful, what worked and what didn't, so if you try again whether it be for this policy or for something else what can you use as lessons learned? What were successful strategies that can really help boast your future efforts. Also for each of these five approaches Action Plan Forms we give resources that we think will be helpful. We try not to, we have information here about considerations and questions for you but a lot of the how to steps are a lot more in depth for the considerations are found elsewhere. We tried to link you to some of the best resources on the web for that most of which are Child Welfare related but sometimes we went outside the field to find other resources as well. And at the end of the forms there is a next steps template and this is something that allows you to develop a strategic plan for how you're going to move forward and allows you to fill in what tasks will need to be undertaken to move forward and the person responsible, expected outcomes and allows you to with the progress of each task as move forward even listing the completion dates as well. It's just sort of it's a nice simple tool to help

guide you moving forward, allow you to put your thoughts for what the next steps really should be in there. Go to the next slide.

That actually brings us to the walk through and I can show you the guide itself but I think for this part Gary it might help if I had control.

So I guess Gary can you see the website now to make sure that I'm sharing?

Gary De Carolis: Yup, yup.

Matt Shuman: So this is the jump site for policy action guide and the website is listed there on your slides it's www.childwelfare.gov/policyactionguide and this first page here is the introduction and this is going to give you an idea of the steps that we are going to take you through which of the three main steps which I talked about before there's the assessment, there's selecting approach, and then developing an action plan for those approaches as well. It gives you the option over here in that blue box on the right to download the entire policy action guide in both a word document and a PDF and so that way if you just want to download the forms and go you can do that right away rather than going to the site and over here on the right it gives you links to the other sections where you can get back to the introduction, the assessment, the approach selection, and each of the five approaches.

So what we're going to do now is jump over to the assessment and just like before there's a blue box where you can download the full assessment rather because what you see here are some of the considerations or the questions we ask but, it's not an interactive form. If you want to actually complete a PDF or doc form you can click on the doc or PDF buttons and it'll open up a PDF that looks or doc that looks like this I'm going to show you the full assessment here. This is the Word doc version and it's going to take you through different questions for considering well what do you want to do with your policy? How are you going to implement it? Is this the right, are you going to be tackling do you have evidence to show what you're trying to enact is actually going to help. So for instance we're going to ask you what is your problem or issue that you are seeking to address? And it allows you to enter text here, so you can enter your text and that way you can save it to your computer, send it to your stakeholders, your partners, your team and really make this a living document that maybe you have some of the information but you want to send it on to other partners that could provide additional information and the assessment gives you the questions you have to think about. We ask that you get into the question a little bit more so not just for example number four what objectives are you hoping to achieve but thinking about are your objectives smart, are they specific, measurable, achievable, relevant and time balanced? We want to make sure that these objectives are going to lead to long term Child Welfare proven in the outcomes.

And one of, I'm going to skip ahead to question number ten where it asks about existing policies. I think this is a really important section where you can look at the current environment, what policies currently exist that deal with your particular issue area? Because I think you want to know what's already there, you don't want to reinvent the wheel, you want to see what policies exist that currently support what you are trying to do, are there policies that go against what you are trying to do, do you really need to change a previously existing policy rather than create a

new one so we're trying to lead you in that direction to get them to thinking about everything that is out there that might impact how they move forward. And then we also ask about environmental contextual factors basically what factors support the initiative and what may hinder how you move forward. And for all of these questions you can enter text, save it, and then at the very end we actually just have a little bit on logic models, just a paragraph, because I think that could also be helpful moving forward with a policy approach or even programmatically as you, if there's a program being implemented based on the policy using logic models is a very useful way of moving forward and there is a link to the logic model builders site on Child Information Gateway which is very useful for helping develop logic models to see what you need to include.

I'm going to jump back to the website itself, and move onto the approach selection guide. And here at the top it lists a number of bullets about ways that you can use the information you've entered in your assessment as you consider what approach you want to take. For instance, the third bullet deals with the geographic area. If you are looking to only affect a particular community in that city you might not want to look at state legislation or federal legislation as a way to move forward. Perhaps a multiparty agreement or a policy within your local agency might be the way to go and just sort of using the information you've already entered and applying it to your selection. This blue box here on the right allows you to download the full guide again which includes the selection guide and here I'm going to scroll to that policy action, policy approach snap shot and this is what Gary had talked about earlier where we list the five approaches and just using three criteria we kind of in a sense rank them against each other, the criteria being preparation, which is the degree of effort required to enact a policy, feasibility, the likelihood the policy can be enacted and sustainability which is the likelihood that the policy will be upheld overtime by the approach and just using a very simple scale which is low, medium or high or easy, moderate, difficult we try to rank how these approaches go against each other so if you don't have much time to prepare, then maybe a proclamation, which is an easy preparation level might be the way you want to go but if you have more time you can look at the more extensive preparatory levels and [inaudible] and [inaudible] you need something that is going to last over time maybe a legislation or regulation would be the way to go as opposed to a proclamation which might be easier to enact but, it's hard to sustain over time because it's generally a non-binding policy.

At the bottom of this page you have I guess, a tabbed table with all five approaches. And this gives you some criteria that you might want to know when you're determining well which approach you should I select? It gives you a definition of the approach, an example that we gathered from the Child Welfare field so for instance for legislation it has some legislation that was passed in Colorado about collaboration among Child Welfare agencies and developing a memorandum of understanding with the court the best part of legislation they had to install a memorandum of understanding. It also has why you might want to consider a particular approach, why you may not want to consider that approach, which might be equally as important because there are a lot of good reasons why you might not want to select a particular approach for your policy and then other points to consider as well. And then you can just click on the tabs to go to different approaches.

And if you wanted to download the action form right from this page that blue box over here allows you to click on the doc or the PDF buttons and download those to your computer. And one thing to know about the docs and PDF, the reasons why we have two different version is one, accessibility. Some people like, have an easier time using one form or the other or just don't have access to any Adobe or for whatever reason are more comfortable. But also, a PDF everything is nice because the format will stay the same but it doesn't give you as much flexibility whereas a Word Doc gives you a little bit more flexibility. If you want to basically write forever in a Word Doc you can. If you think you're going to enter a lot of information into these forms I would suggest using the Word Docs because it's really unlimited whereas a PDF because the structure of the format of each page stays the same, you may only have 10 lines to enter your information. So if you're somebody who really likes to throw everything into there I would recommend using the Word Docs moving forward.

And then you can also click on this text over here if you want to view just the considerations you want to go to the html page and click on that, which I will do now. And it's going to take you to the, this only has the considerations to the action plan form. And if you just wanted to gather some information quickly and you decided well I know it, I just don't have the time to fill out a form you could come to the html page and just scroll through and see what was available or what thoughts that we've had about this particular process so we're going to touch on some of the topics we talked about before, understanding contacts and process, who should be involved, the leaders, the partners, what do you see done, developing the draft, planning an outreach strategy, identifying resources, assessing the results.

And I am going to show you what the PDF form looks like over here. So for legislation, you can see here that there is a little bit of intro, and then their considerations for the process and some of those might be understanding the context and process, are there existing higher level policies, like [inaudible] or federal state laws, are there internal policies or initiatives that might be supportive or restrict the development of your policy. Do you need to make changes of the higher level before you move forward? For identifying partners, you might want to consider which external stakeholders such as service recipients in other organizations or service providers in the community will benefit from or be affected by the proposed policy are these people or organizations you want to include in your process and similarly when you're developing the policy how are you going to incorporate their input into the final policy that you propose. What we try to do is capture the considerations that might not be at the forefront of people's minds but as they're moving through the policy make sure they're thinking about them early on in these planning stages because a lot of times if you've gone to orientation or even if you've sent something to the legislature or administrator for approval, you might be too late to incorporate. We really want to help users think through as much as possible moving forward so that they have a complete and useful policy when they get to the end.

And I'm just going to quickly show you the next steps template I mentioned. And this is really just a simple table where you can list your activities and tasks, the person responsible, your start and end dates, and expected outcomes. This is a nice a way of tracking and this might be something you can create on your own using Outlook or Microsoft Project, or some other but it's really something that you need to make sure you have actual steps moving forward because a policy is a very very complex process that might, depending on which of the policies you select

it could take a long time so I think having your thoughts and steps organized and having people held responsible for what's going to be completed is really an essential piece.

As a quick walk through, that's what I wanted to show you. Were there any questions about the policy action guide, how to use it, any of the components that I showed you?

Gary De Carolis: Elyse, maybe you could list the mute and people can talk for a second.

Or people could type in a little question over there in the right hand side and Matt will be happy to address it.

Matt Shuman: Okay, I guess we can just move onto the next session. Just let me know when to move the slides along. Okay.

Gary De Carolis: Okay, good.

So we put together a set of sustainability tips and these are little pieces of wisdom that people gave us over time that will help sustain policy and help make it continue to be relevant and part of your mix.

So the first one, I mentioned earlier, is that multiparty agreements should extend for no more than one year and should be renewed annually. You really want to keep this thing alive, an active document that reflects where you're going and so I've seen people use their multiparty agreements as a place for their strategic planning retreat every year. And take a look at it and work, make any changes that are necessary and then as I said Alamance County, North Carolina has a very public signing process of that new agreement for the next year. You want to be as specific as possible, in any agreement, because it really is what will determine how you work together. And so minimizing some vague notions and being very specific is actually people's titles and names and what they will do. The more specific, the better. And insure that you have as many stakeholders as possible involved in drafting the policy. In a sense you're gathering support by your involvement of people having their fingers on that draft. So, you can go to the next slide.

Okay, so here if you're going to go the legislation route and Matt's showed you that chart, this is the most difficult policies to go from draft to implementation. And also the most, the chances of it changing, once it hits the legislature is high and you have to have someone that's going to watch dog this all the way though. But you want to have some relationship with members in both houses so that they can be your eyes and ears and watch dog for the draft legislation as it's going through its various committees and moves from one chamber to the next. It's very, it can easily get changed and look at the end nothing like it looked when you first put it into the hopper. The legislative hopper. And I've seen some people at the end say you know what this looks so different than what we started out with. The intent is totally different and we asked that it be pulled rather than become a law because it just wasn't going to be. So that's something that you have to keep very close tabs on.

Having a communications campaign as you're doing all of this work to get your story out there is very very important. In the end, if it's a legislature that's doing this work for you some would say that the legislature will only goes as far as the public will let them go so if you have an informed public the likelihood of you having an informed legislature is high if you have a public that's not really aware of what you're doing and the chances of a legislature e being supportive of what you're doing is going to be reduced because there's no pressure to have them move on this because no one really is aware of this whole thing, this whole effort, this whole policy that you're trying to create is all about. So getting out there in the public eye is very important in this process. A part of that is creating forms so that people who have been involved in the work have a chance to tell not only you, but, tell those that need to hear it their experience of why this policy would be of great help. Why a System of Care has been helpful to their family for example, some of the results that the interagency collaboration has meant to the various systems in different ways, telling their story from different vantage points to talk about the benefits of the policy that you're trying to create. Can you change the slide?

And also, you know, provider groups, getting those groups together and having them be able to talk about the benefits and challenges of services and make recommendations on the policies that they would like to see happen so that they can work at an optimum level. That's an important group of people in our field that probably have a lot to say about what this policy might mean for them. And then of course, as we've both been saying, include data reporting as a party of all policies that have been developed for your system.

Okay. As we're going to the resources, this is where you can find everything that we've talked about and more. Last chance for questions. Anyone want to type in a question? Okay, so on this page you have the System of Care homepage in the Information Gateway and that's the address to that. The infrastructure toolkits that I mentioned are next. The Policy Action Guide is listed there and then there is a new video series that we've just completed recently. Some great videos on family engagement in Child Welfare and those are up as well. As well as a ton of other resources on that System of Care homepage. If you go there you'll find a lot of things from, I can't even begin to tell you all of them but it's everything you ever wanted to know about Systems of Care and Child Welfare, family engagement, leadership issues, accountability, all the principles of a system of care, a nice five to ten page pieces about them. It's all there for you.

And lastly, if you would like me to be in touch with the director of the TA center, it's Aracelis Gray and feel free to give her a call or email her with any of what we've talked about and she will guide you to where you want to go and she's a great resource and unless there is another question then Matt if you have any final words that you would like to say. I'm going to say thanks for being with us today. It's been great to share with you some of what we've put together around policy and wish you the best of luck in your endeavors.

Matt Shuman: And I want to say thank you to everyone for listening and I really hope you find the information from today and the resources we've made available useful to you and best of luck.