

CRCG HANDBOOK 2005



This handbook is designed to provide information for and about Community Resource Coordination Groups (CRCGs) serving children, youth, families, and adults.

This handbook updates the *CRCG Handbook – revised 2002* developed for CRCGs for Children and Youth and includes information about CRCGs for Adults and Families.



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CONTENTS

WHAT ARE COMMUNITY RESOURCE COORDINATION GROUPS	1
WHAT DO CRCGS ACCOMPLISH?	1
DEFINITIONS	2
HISTORICAL SKETCH	3
TIMELINE	3
OVERVIEW OF CRCG MODEL AND GUIDING PRINCIPLES	6
DEVELOPING A NEW CRCG OR RE-ACTIVATING A CRCG	7
THE INITIAL ORGANIZATIONAL MEETING	8
QUESTIONS TO CONSIDER IN DEFINING A CRCG	10
CRCG STRUCTURE	11
MISSION	11
BY-LAWS OR POLICIES AND PROCEDURES	12
GROUND RULES	13
LEADERSHIP	13
ROLES/RESPONSIBILITIES	14
CRCG PARTICIPATION	15
MEMORANDUM OF UNDERSTANDING	16
CONSUMER/CAREGIVER/FAMILY MEMBERS	17
PUBLIC SECTOR MEMBERS	17
PRIVATE SECTOR MEMBERS	18
ATTENDANCE AND INVOLVEMENT	18
EFFECTIVE CRCG MEMBERS	19
RELEASE OF INFORMATION	20
REFERRALS	21
THE REFERRAL PROCESS	21
WHAT FACTORS CONTRIBUTE TO STEADY REFERRALS?	22
WHAT HAPPENS IF REFERRALS ARE LOW?	23
STRATEGIES FROM LOCAL CRCGS FOR INCREASING REFERRALS	24
THE CRCG MEETING	27
DEVELOPING AN INDIVIDUAL SERVICE PLAN	27
OTHER POTENTIAL FUNCTIONS OF THE CRCG MEETING	29
DISPUTE RESOLUTION	30
EVALUATION	31
SERVICE PLAN DATA COLLECTION	32
OFFICE OF PROGRAM COORDINATION FOR CHILDREN AND YOUTH	34
APPENDICES	35

WHAT ARE COMMUNITY RESOURCE COORDINATION GROUPS

Community Resource Coordination Groups (known as CRCGs) are local interagency groups comprised of family and consumer members, public providers, and private providers who come together to develop Individual Service Plans (ISP) for children, youth, and adults whose needs can be met only through interagency coordination and cooperation. Throughout this document, the acronym CRCG is utilized to refer to any inclusive community resource coordination group regardless of targeted age population.

CRCGs are county-based and may serve one or more counties. The focus of each group is determined by the members of the team. CRCGs may serve primarily children and youth, or adults. Some areas of the State have developed a CRCG model that blends the CRCG for Children and Youth with a CRCG for Adults, creating a single combined CRCG for Families that serves children, youth, families, and adults. Young adults between 18 and 22 years of age may be served either through a CRCG serving children/youth or adults, as long as both the children and adult providers from public and private agencies work together to develop a service plan that meets the identified needs.

What do CRCGs accomplish?

CRCGS meet on a regular basis to plan specific services for children, youth, and adults whose needs have not entirely been met through existing resources and channels. Through collaboration between public and private agencies and organizations and family, consumer, and caregiver representatives, CRCGs improve coordination of community-based services for children, youth, and adults

The public and private partnerships of CRCGS also benefit their local community by identifying service gaps and barriers and by working toward finding traditional and non-traditional solutions. CRCGs help to stretch existing resources further, and are often successful in finding new resources and funding to address service gaps and barriers.

Definitions

All Community Resource Coordination Groups:

- Are local interagency groups serving a single county or a group of counties
- Are composed of public and private agencies and family members
- Have an inclusive focus in that individuals with any multiagency need can be referred rather than focusing on a specific special population.

A CRCG for Children and Youth (CRCG):

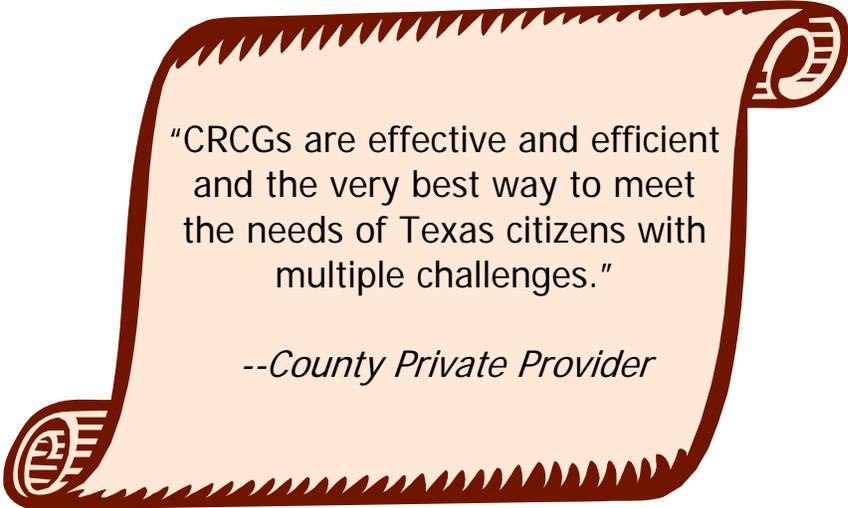
- Develops individual service plans for children and youth from birth to 22 years of age whose needs can be met only through interagency coordination and cooperation
- May also consider needs of adult members of a family as part of an overall family-focused service plan in planning services for a referred child or youth, at the discretion of the group
- Coordinates services designed to support the least restrictive environment
- Collaborates with the CRCG serving adults in the community.

A CRCG for Adults (CRCGA):

- Develops individual service plans with adults 18 years of age or older whose needs can be met only through interagency coordination and cooperation
- May also consider needs of children or youth members of a family as part of an overall service plan for a referred adult, at the discretion of the group
- Collaborates with the existing CRCG serving children and youth in the community.

A CRCG for Families (CRCGF):

- Develops individual service plans with children, youth, families and adults of any age whose needs can be met only through interagency coordination and cooperation.
- May choose to have subcommittees that meet to focus more exclusively on children and youth, or adults, at the discretion of the group.



"CRCGs are effective and efficient
and the very best way to meet
the needs of Texas citizens with
multiple challenges."

--County Private Provider

HISTORICAL SKETCH

CRCGs for Children and Youth originated with legislation passed in 1987 directing state agencies serving children to develop a community-based approach to provide better coordination of services for children and youth with complex multiagency needs. CRCGs for Children and Youth developed across Texas with a local CRCG being available to all 254 Texas counties to serve children and youth by 1996.

Interest began several years ago in adapting the CRCG model to serve adults with complex multiagency needs. Following a demonstration project implementing the capacity to serve adults through a CRCG (CRCGA) in 1999 and 2000, the process began to “roll-out” CRCGA development across the state. Some communities are adding the capacity to serve adults through a CRCG by expanding the current CRCG for Children and Youth to serve all ages – becoming a CRCG for Families (CRCGF). Others have chosen to develop a separate group to serve adults (CRCGA).

Timeline

- 1987** The Texas Legislature enacted Senate Bill 298, requiring eight¹ child-serving public agencies to work together to assist children and youth who were falling through the cracks in the service system. These eight agencies, along with the Texas Commission on Alcohol and Drug Abuse, private sector organizations and advocates, developed the Community Resource Coordination Group model.
- 1988** The Community Resource Coordination Group model established interagency service planning at the local level and was piloted in Henderson, Tarrant, Travis, and Val Verde counties in 1988 and 1989.
- 1990** Training materials were developed and a consultant was retained to assist counties throughout Texas in establishing CRCGs to assist children and youth with complex needs in their communities.
- 1991** The State CRCG Team was established to oversee the development of the CRCG process, including the implementation of the interagency Memorandum of Understanding (MOU).
- 1993** The State CRCG Office was established as a permanent office at the Health and Human Services Commission to provide on-going technical assistance and training for CRCGs.

¹ Texas Youth Commission, Texas Juvenile Probation Commission, Texas Education Agency, and Legacy Agencies: Texas Department of Protective and Regulatory Services, Texas Department of Mental Health and Mental Retardation, Texas Department of Health, Texas Rehabilitation Commission, and the Texas Commission for the Blind

1995 Counties began approaching the State CRCG Office for assistance in adapting the CRCG model to adult populations. Unlike the CRCGs for Children and Youth, most of the early CRCG initiatives for adults focused on specific populations such as individuals with Alzheimer's disease or guardianship issues, co-occurring mental illness and substance abuse, or individuals being released from state jails. Other local CRCGs for Adults were developed with an inclusive focus to serve a broader group of adults with complex needs, regardless of diagnosis or presenting issue.

1996 A local CRCG is available to all 254 counties in Texas to serve children and youth.

1998 A study was commissioned to examine the emergence of CRCGs for Adults and to determine the appropriate direction/strategies for the State CRCG Office. Results indicated strong support for developing CRCGs for Adults, especially a CRCG model with an inclusive focus. The study recommended:

- Establishing a State Team to oversee providing support to local areas establishing or operating CRCGAs
- Developing a Memorandum of Understanding among the state agencies
- Hiring a CRCGA state coordinator
- Developing and implementing a pilot program to test the CRCGA concept
- Developing support for hiring CRCGA coordinators at the local level.

1999 An evaluation of the CRCGs for Children and Youth was conducted by the University of Texas – School of Social Work. The evaluation identified best practices and noted that CRCGs participating in the study were meeting the objectives of the Memorandum of Understanding.

The State CRCGA Team was formally established in January. The CRCGA Demonstration program was launched in June with six local CRCGA sites. Five sites (Brazos Valley CRCGA, Panhandle CRCGA, El Paso, Harris, and Travis counties) had been operating and a sixth site, Smith/Henderson CRCGA, was initiated by the State CRCG Office to develop experience in starting a CRCGA. In October, the State CRCGA Team adopted a CRCGA Model and Guiding Principles.

2000 The CRCGA Memorandum of Understanding was developed and fully executed in May. Following an evaluation study commissioned by the State CRCGA Team, the Demonstration Program was concluded in November 2000, and a statewide CRCGA development initiative was implemented.

2001 The Texas Legislature enacted Senate Bill 1468, codified in Texas Government Code §531.055, requiring the development of a joint memorandum of understanding (MOU) on services for persons needing multiagency services. Jointly developed by the State CRCG Team and the State CRCGA Team, this memorandum of understanding provides for a statewide system of county-based, interagency community resource coordination groups to coordinate services for persons of all ages, including children, youth, and adults who have complex needs and need services from more than one agency.

2003 The Texas Legislature enacted House Bill 2292, which contains Section 2.166 related to the Provision of Services for Certain Children with Multiagency Needs. This requires the local CRCGs to evaluate systems of care for children with severe emotional disturbances who have multiagency needs. The evaluation information will be provided to the Texas Integrated Funding Initiative (TIFI) Consortium in order to create a summary report of the CRCG evaluations. This report will also include agency implementation of appropriate recommendations. Additionally, in 2003, the TIFI and CRCG state offices have been combined under the HHSC Office of Program Coordination for Children and Youth. Additionally, the two State CRCG and CRCGA Advisory Teams were abolished under H.B. 2292 through reorganization efforts to achieve administrative cost savings.

2005 The Texas Integrated Funding Initiative submits recommendations in its *Report to the Governor and 79th Legislature: Systems of Care for Children with Severe Emotional Disturbances and Their Families*, based upon the evaluations submitted by local CRCGs, per House Bill 2292, Section 2.166, 78th Legislature, Regular Session, 2003.

OVERVIEW OF CRCG MODEL AND GUIDING PRINCIPLES

Community Resource Coordination Groups are locally designed, developed and managed. To ensure basic standards and consistency across the state, State and local stakeholders have developed a Model and Guiding Principles.

- Each CRCG should include representatives of the state agencies that have signed the Memorandum of Understanding or their local affiliates, representatives of private agencies, and at least one consumer representative (individual, family member, or caregiver). All CRCG members should have the authority to commit services or resources for individuals and families referred to the CRCG.
- The role of a CRCG is to develop a coordinated strengths-based Individual Service Plan (ISP); an agreement for coordination of services developed in partnership with the individual or family.
- Services should be provided in the most home-like, nurturing environment and the least restrictive environment possible. The ISP will provide for services within the community where possible and within the least restrictive environment outside the community where necessary.
- The involvement of the individual or family is essential to the success of the development and implementation of the ISP.
- Individuals referred are those who have encountered barriers or obstacles to getting their entire needs met through existing resources and whose needs can be met only through interagency cooperation. Prior to referring an individual, the referring agency will have explored services and resources within and outside the agency.
- Agencies are expected to provide the maximum flexibility possible, within existing eligibility criteria and funding policy, in committing services and resources for individuals referred to the CRCG.
- The agency with primary responsibility for providing services identified on the ISP is determined by the CRCG to be the lead entity for overseeing the plan and follow-up.
- Each CRCG member is responsible for ensuring confidentiality for referred individuals and families. Members who represent an agency or organization should follow their agency's/organization's policies for confidentiality.
- When placement outside the community is necessary, the ISP will include a plan for reintegration of the individual into the community and, as appropriate, into the family.

DEVELOPING A NEW CRCG OR RE-ACTIVATING A CRCG

"Don't agonize. Organize."

- Floryence Kennedy

Local Community Resource Coordination Groups for Adults (CRCGA) have not been established in all 254 counties in Texas. Following the demonstration project involving six sites, additional CRCGs that focus on adults are developing across the state. Several new CRCGAs have joined with the CRCG for Children and Youth to have a single CRCG that focuses on children, youth, adults and families (CRCGF).

While local Community Resource Coordination Groups for Children and Youth have been established to serve all 254 Texas counties, CRCGs function at different levels. Some may have decreased their activities or meetings. These CRCGs may be looking at renewing some of their efforts to re-develop and re-activate the work of the group.

People come together as a Community Resource Coordination Group for many reasons. They are committed individuals and representatives of agencies who work to improve the quality of life for the citizens of their community. They are aware of the strengths of their community but have also identified gaps or barriers that are significant challenges for children, adults, or families seeking services and supports.



The Initial Organizational Meeting

Usually one or two individuals or a small group, often from a state agency or local affiliate, assume the responsibility for bringing together the key leaders from state agencies, local affiliates, and other public or private human services organizations in their community.

Identify the key individuals, agencies or organizations providing human services and supports in your community, including state agencies, local state agency affiliates, private non-profit organizations, faith-based organizations. As noted in Texas Government Code §531.055, the following state agencies or their local offices or affiliates are mandated representatives to the CRCG.

- Texas Department of Aging and Disability Services (DADS)
- Texas Correctional Office on Offenders with Medical or Mental Impairments (local TCOOMMI community-based program)
- Texas Department of Criminal Justice (TDCJ)
- Texas Department of Assistive and Rehabilitative Services (DARS)
- Texas Department of Housing and Community Affairs (local community action agencies)
- Texas Department of Family and Protective Services (DFPS, Child Protective Services and Adult Protective Services)
- Texas Department of State Health Services (DSHS)
- Texas Education Agency (TEA, local school districts, and Education Service Centers)
- Texas Juvenile Probation Commission (TJPC, local Juvenile Probation department)
- Texas Workforce Commission (TWC, Local Workforce Board and/or Workforce Center)
- Texas Youth Commission (TYC)

The statute also mandates the participation of the following:

- Standing members representing family members or consumers needing multiagency services or caregivers of persons needing multiagency services (other than those being actively served at the CRCG meeting).
- Representatives of local private sector organizations or agencies/organizations that can contribute services to an individual service plan, such as:
 - housing provider
 - local counseling and other health providers
 - Salvation Army
 - United Way
 - hospitals or other health care providers
 - other local private sector organizations.

Strategies for success

- Identify a date, central location, and an accessible meeting site.
- Contact the Office of Program Coordination for Children and Youth at HHSC to request various levels of technical assistance, including:
 - Materials
 - brochure
 - fact sheet/background information
 - current CRCG sites/contacts
 - available data
 - CRCG presentation/orientation from state office staff and/or local CRCG leadership from another county.
- Develop a letter of invitation to individuals in the key agencies and organizations identified above. A sample letter of invitation is available. You may wish to use the sample as a model and include additional information about the challenges in your own community that are prompting the potential development (or re-development) of a CRCG.
- Develop an agenda.
 - What are CRCGs?
 - Who are the players?
 - How did the CRCG develop in another county?
 - What is the CRCG process and what will it look like in our county?
 - Case Scenarios
 - Leadership Team
 - Regular meetings
- Follow up the letter of invitation with a personal contact.
- Hold the meeting in a comfortable location accessible to individuals with disabilities, at a time and place that is convenient for the most participants.
- Consider “piggy-backing” the meeting with another meeting that is already scheduled that may include many of the individuals you have invited to participate in the initial CRCG organizational meeting.



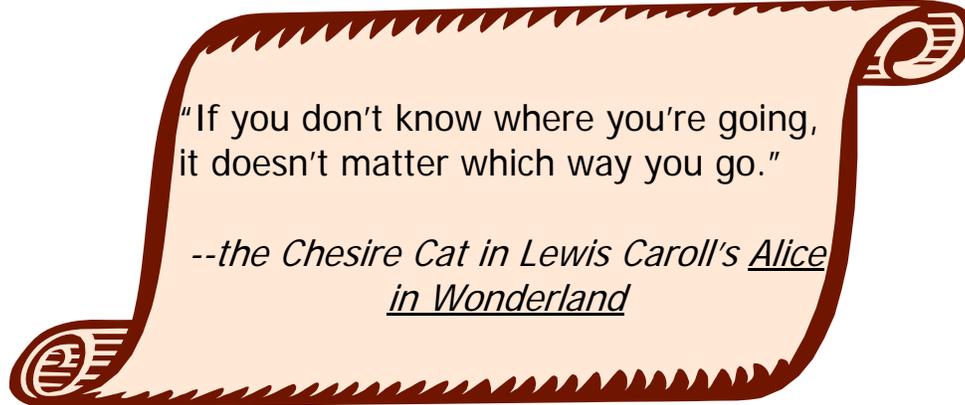
“CRCG works! I felt that way and still to this day I feel a closeness to the CRCG, because they cared!”

*--Parent of a Child served by a
CRCG*

Questions to Consider in Defining a CRCG

- Are all stakeholders included in discussions and decisions?
- What age group will be served? (For example: children and youth between birth and 22 years of age? Adults over age 18? Or a combination for all children/youth and adults?)
- Will the CRCG cover one or more counties? Will monthly meetings stay in one place or rotate from county to county in a multiple county service area?
- Do the same case managers serve multiple age groups in the proposed service area, i.e. does a specific person cover the needs of all age groups, or are case managers' duties divided among two or more people and defined by the ages of the persons served?
- Do natural boundaries exist? (Examples: agency service regions, travel distances, concentrations of specific non-English speaking populations, defined areas such as Colonias, etc.)
- Do natural partnerships exist? (Example: a situation where one county/city contains the services and the connecting county is rural and dependent upon travel to the neighboring county for services, or a two-three county area that traditionally shares multiple services and activities.)
- Is the population of a county changing dramatically? (Example: economic shifts such as major employers either coming to or exiting an area, an influx of retired persons, etc.)
- How will the team get referrals?
- What are the next steps for developing the CRCG in our area?

CRCG STRUCTURE



Mission

A mission statement sums up your CRCG's reason for being. It explains your intentions, priorities, and values to those inside and outside the group. It is a brief statement that will guide you and help you stay focused on the things that are most important to you.

A mission statement is created by answering the following questions:

- What are we here for?
- What do we want the CRCG to accomplish?
- What do we want to get out of the CRCG for ourselves?
- What do we want the customer to get out of the CRCG?
- What values, standards, or goals do we never want to lose sight of?

Ideas for communicating your mission to anyone who wants to know what you are all about and to new and current members of the CRCG:

- Publish the mission in your brochure.
- Use it on your CRCG stationery.
- Include the mission in the minutes of each CRCG meeting.
- Include it on your web site.
- Refer to the mission in a newspaper or newsletter article about your CRCG.
- Copy it on a large easel and display it for each CRCG meeting.
- Read the mission statement at the beginning of each CRCG meeting to focus the team.

Once developed, the mission statement should be periodically reviewed by the CRCG. Over time, your experiences and the input of new members may cause you to revise the mission or purpose of the CRCG.

By-laws or Policies and Procedures

By-laws or policies and procedures may be developed by the CRCG to describe the basic organizational components of the group. They may be quite detailed and comprehensive or simple as determined by the CRCG.

What are the basic elements that by-laws should include?

- Name of the group
- Meetings
 - When and how often you meet
 - Who facilitates the meeting
 - Who takes minutes/records data/reports data
 - How decisions are made (consensus, modified consensus, majority vote)
- Membership
 - Attendance expectations/requirements
 - Filling vacancies/adding new members
- Organizational structure
 - Officers
 - Titles
 - Responsibilities
 - Terms
 - Selection
 - Committees
- Orientation of new members
- Review and modification of bylaws



Ground Rules

Sometimes referred to as Communication Guidelines, ground rules are simple, basic rules that the group has agreed to operate by. These rules reflect statements about individual behaviors that are encouraged to make the meeting as effective as possible for all participants. Ground rules can be copied on large easel paper and displayed at each meeting to remind members of these basic rules they have agreed to.

Examples of Ground Rules:

- Meetings will start and end on time.
- Avoid personal attacks and the use of labels.
- Avoid sidebar conversations.
- Encourage everyone to participate.
- Monitor your own "air-time."
- Don't interrupt.
- Stay on the subject, stick to the agenda.
- Silence cell phones or pagers.
- Be respectful of all attendees, especially person(s) being served.
- Use non-judgmental language.
- Avoid use of acronyms.

Leadership

Leadership can be shared within the CRCG by a leadership team. A leadership team shares the responsibility among several individuals, allowing the CRCG to accomplish more while keeping the burden on any one individual from becoming too great. For additional information, see **Guide for New Chairs of CRCGs** available on request from the State CRCG Office or the CRCG website.

The leadership team is typically made up of a Chair, Co-Chair (or Vice-Chair), and a Recorder/Secretary. How the CRCG selects its leaders is a decision made by each CRCG. Some CRCGs schedule annual elections and elect their leader(s) at a specific monthly meeting each year. Others rotate the Chair among agency members each year as a way of sharing the leadership responsibility among agencies. For some CRCGs, the Co-Chair or Vice-Chair is the "next in line" and assumes the role of Chair the following year. Some CRCGs maintain the same person as Chair for as long as s/he is willing to fulfill that role.



Roles/Responsibilities

Chair – The roles/responsibilities of the chair may include, but are not limited to:

- overall responsibility for managing the CRCG
- facilitates CRCG meetings
- may be an ad hoc member of any or all CRCG working subcommittees
- often is the spokesperson for the CRCG to the general public and other audiences
- serves as a referral point of contact for the CRCG
- liaison to Office of Program Coordination for Children and Youth.

Co-Chair – The co-chair's responsibilities may include:

- facilitates meetings when the Chair is absent
- assumes roles as delegated by the Chair, agreed upon by the Leadership Team, or assigned by the CRCG as a whole.

Recorder/Secretary – Duties of the recorder/secretary may include:

- keeps a record of the meeting minutes
- maintains an accurate up-to-date membership roster
- maintains consumer data and completes CRCG data collection forms
- sends meeting notices
- sends timely reminders to lead agencies responsible for follow-up reports at upcoming meeting.

Coordinator

As CRCGs grow and evolve, especially as the volume of CRCG referrals increases, many CRCGs may benefit from having a Coordinator. A coordinator is a dedicated staff position to assist the CRCG in a number of ways. The roles and responsibilities of the coordinator differ from those of the Chair. The coordinator serves as staff to the CRCG, rather than as a member. Based on the individual CRCG and the decisions of the leadership team, the Coordinator may assume many of the tasks that have been assumed by the Chair or others in the leadership team, including:

- screening referrals
- meeting preparation
- minutes
- public awareness presentations
- data collection and reports
- lead point of contact for follow-up activities on an individual service plan when there is not a clear lead agency.

CRCG PARTICIPATION

The heart of the CRCG is the active participation of its members. It is the CRCG members who commit their agency's services and resources that are the essential elements of the ISP. It is the members, for the most part, who refer individuals to the CRCG. It is the members who carry out the ISP and it is the members who are responsible for the organization and structure of the CRCG itself. The Office of Program Coordination for Children and Youth has developed a publication as a resource to provide a clear and concise orientation to a new member or representative joining the CRCG. This publication and the **New Member Guide** are available on request from the Office of Program Coordination for Children and Youth or the CRCG website.

Mandated membership for CRCGs is detailed in Texas Government Code §531.055, including the following state agencies or their local offices or affiliates:

- Texas Department of Aging and Disability Services (DADS)
- Texas Correctional Office on Offenders with Medical or Mental Impairments (local TCOOMMI community-based program)
- Texas Department of Criminal Justice (TDCJ)
- Texas Department of Assistive and Rehabilitative Services (DARS)
- Texas Department of Housing and Community Affairs (local community action agencies)
- Texas Department of Family and Protective Services (DFPS, Child Protective Services and Adult Protective Services)
- Texas Department of State Health Services (DSHS)
- Texas Education Agency (TEA, local school districts, and Education Service Centers)
- Texas Juvenile Probation Commission (TJPC, local Juvenile Probation department)
- Texas Workforce Commission (TWC, Local Workforce Board and/or Workforce Center)
- Texas Youth Commission (TYC)

The statute also mandates the participation of the following:

- standing members representing family members or consumers needing multiagency services or caregivers of persons needing multiagency services (other than those being actively served at the CRCG meeting)
- representatives of local private sector organizations or agencies/organizations that can contribute services to an ISP, such as:
 - housing provider
 - local counseling and other health providers
 - Salvation Army
 - United Way
 - hospitals or other health care providers
 - other local private sector organizations.

It is vitally important that members have both the knowledge of their agencies programs and the authority to commit the agency's services and resources "on the spot" at the CRCG meeting when the ISP is developed. Many of the individuals referred to the CRCG have long experience with ideas being suggested but not committed. They are often in crisis and cannot wait for someone to get back to them with a decision as to whether or not a service or resource can be provided. The effectiveness of the CRCG to coordinate and integrate services is compromised if one or more members are unable to commit a service or resource integral to the ISP.

Memorandum of Understanding

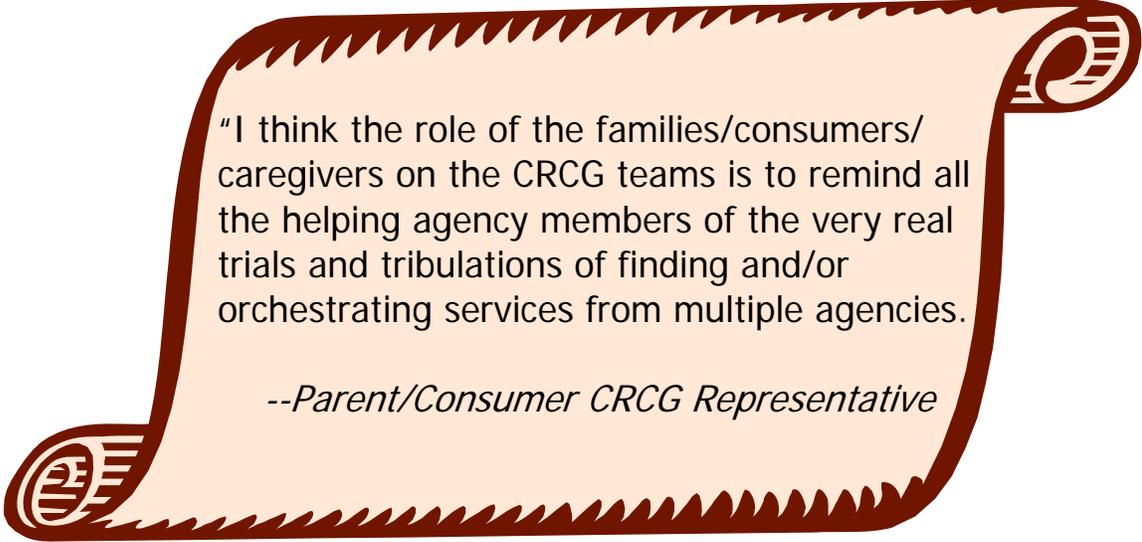
Previous Memorandums of Understanding (MOU) were developed for the CRCGs for Children and Youth and for the CRCGs for Adults. Based on legislation enacted by the 77th Legislature, a joint memorandum of understanding has been developed with relation to a statewide system of community resource coordination groups for all ages (children, youth, adults, and families). The state-level MOU replaces previous CRCG MOUs and provides a mechanism for demonstrating the commitment from participating agencies. Local CRCGs may wish to utilize the state-level MOU as a model for developing a local agreement. Although the state-level MOU includes only state agencies, local CRCGs may wish to include state agency local affiliates, community private organizations, and faith-based organizations to identify clear expectations of participants.



Consumer/Caregiver/Family Members

Consumers as standing members of the CRCG have proven to add a richness and depth to the group not achievable by service providers alone. A consumer member may be a parent or other family member, an individual previously served by a CRCG, or a caregiver of an individual previously served by a CRCG. A consumer, caregiver, or family representative has a personal experience with navigating the system of services for themselves or a family member.

Consumer representatives help keep the discussion clear and focused on the needs of the individual being served by obligating the other members to speak in understandable language and by providing an early "reality test" to proposed service ideas. They can provide an empathetic presence and sense of identification for the individual or family member seeking assistance from the CRCG who may experience some anxiety about discussing their personal lives with a large group of strangers.



"I think the role of the families/consumers/caregivers on the CRCG teams is to remind all the helping agency members of the very real trials and tribulations of finding and/or orchestrating services from multiple agencies.

--Parent/Consumer CRCG Representative

Public Sector Members

Public sector members of the CRCG include the state agencies who have signed the memorandum of understanding, local affiliates of MOU signatory agencies, and local (city and county) agencies. Local affiliates may be private sector organizations that are contracted by the state agencies to deliver services, such as the local drug and alcohol counseling centers.

The MOU agencies and affiliates are the core members of the CRCGs, as the primary intent of the CRCGs is to meet the needs of individuals and families who are falling through the cracks in the service delivery system.

Municipal or county agencies also play vital roles in CRCGs. Local agencies may have programs, services or resources not available from the state agencies, and eligibility criteria may be more flexible.

Private Sector Members

Private sector members are not-for-profit or for-profit service providers who are able and willing to commit services or resources for persons referred to the CRCG. Private sector members include affiliates for state agencies mentioned above, local ministerial alliances, private hospitals, charitable organizations, local United Ways, etc.

Private sector agencies often provide the “glue” that holds together the ISP, because they frequently have greater flexibility and less rigid eligibility standards than their public sector counterparts.

Attendance and Involvement

Let’s face it – most of us don’t have lots of free time. Finding the time in a busy day to come to meetings can be a significant challenge for many agency representatives. One may feel a need to justify the time spent in the CRCG meeting against meeting with clients or attending to crises within the agency. This is the reality CRCGs face. However, consistent attendance demonstrates personal commitment, and the commitment of the agency, to the CRCG process and to providing integrated quality services to the members of the community.

It is important every member of the CRCG recognizes the value of the collaborative working relationship, and is invested in the belief that the CRCG can accomplish more by working together than by each agency operating independently.

There are several factors that increase the likelihood that CRCG members will find their participation beneficial and useful.

CRCG members are more likely to attend regularly and to actively participate when:

- Each meeting includes the development of an ISP for referred individuals or families, rather than a meeting that consists solely of education or sharing and networking. Contributors to the ISP are not only those who commit services and resources, but are also those who generate ideas and alternatives in the process of developing the ISP.
- They refer individuals or families (especially from their agency or organization’s target population) with the result that challenging situations are resolved and previously unmet needs are addressed.
- They learn about additional services, programs or resources within their own community each time the CRCG meets and can use these services, programs, or resources to assist other clients they work with.
- They share information about their agency’s services, programs, or resources within their own community with others within the CRCG, thereby enhancing public awareness and appropriate referrals for their agency.
- The CRCG addresses systems gaps or barriers within their own community.
- Relationships are built with individuals that can be called on outside the CRCG forum.

- Their attendance and active involvement is recognized as valuable and is supported by their agency's administration.

Effective CRCG Members

As a member of a CRCG, the more you contribute to the strength, capacity, and effectiveness of your CRCG, the greater the value it will be to your community, your agency, and to you. The following represent ten (10) things you can do to increase your effectiveness as a CRCG member.

1. Educate yourself about your CRCG.
2. Attend CRCG meetings consistently.
3. Get to know your CRCG colleagues.
4. Take on a leadership role.
5. Be an empathetic listener.
6. Contribute your ideas to ISPs.
7. Commit your agency or organization's resources as appropriate to individual service plans.
8. Refer consumers from your agency/organization to the CRCG.
9. Educate others in your agency/organization about the CRCG and its value to your agency and its consumers.
10. Build your cultural competency.

Strategies for success

- Identify and recruit at least one parent or family member of a child or adolescent with special needs as a standing representative to the CRCG. Identify and recruit at least one consumer or caregiver as a standing representative to the CRCGA. This family, consumer or caregiver representation brings a critically important perspective of someone who has (or is) struggling with finding and orchestrating services and supports from multiple agencies.
- Identify who is missing who plays (or could play) an important role in the service and support system for individuals with complex needs (including state agencies, other public agencies, and non-profit community agencies and organizations):
 - consult Area Information Center and local community resource directories or guides
 - informal brainstorming/poll of members.

- Develop a letter from the CRCG chair(s) inviting others to become members of the CRCG, including:
 - information about the role and purpose of the CRCG in the county
 - why the agency's participation plays an important role for children, youth and/or adults in this community who have complex needs
 - potential benefit to agency as a result of participation in the CRCG.
- Send a letter to each identified agency or community provider whose participation is missing from the CRCG. Identify a CRCG member who will be contacting them to follow-up. Share responsibility among the CRCG members for contacting and following up for each individual/agency.
- Provide orientation to new members prior to their first meeting so that they may have the background to start their participation from an informative and contributing perspective. The New Member Guidebook, developed by the Office of Program Coordination for Children and Youth, is a resource for orientation for new CRCG members.
- Recognize and welcome new members at each CRCG meeting, stating why their participation will play an important role.
- Contact people who are absent from the CRCG meeting indicating that they were missed.
- If efforts to recruit CRCG participation are not resulting in success, consider asking for assistance from the Office of Program Coordination for Children and Youth for assistance.

Release of Information

Confidentiality is an essential component of the Community Resource Coordination Group process. CRCGs must comply with applicable state and federal confidentiality laws, as well as individual agency policies.

Each agency representative is responsible for knowing his or her agency's confidentiality procedures. If representatives have questions about the appropriate procedure, forms, or protocol for securing releases, it is important they seek direction from within their own agency.

The CRCG may develop meeting procedures that remind the members that confidential information will be discussed. Standing family, consumer, and/or caregiver representatives should be provided an orientation and training on confidentiality procedures relating to the CRCG process.

REFERRALS

The primary purpose of the CRCG is to develop Individual Service Plans for individuals with complex needs who are encountering barriers or who are in need of additional services and require coordination of services among multiple agencies in order to have their needs addressed.

Although service plans are usually developed during regular meetings, it may not be feasible to wait until the next CRCG meeting to develop a plan for someone whose needs require immediate attention. Some CRCGs have developed a plan for being called together on an emergency basis to assist in addressing needs that cannot wait until the next meeting.

The Referral Process

Each CRCG develops its own criteria and procedures for referral of an individual or family to the CRCG. Most CRCGs require a referred individual have needs that cannot be met by one agency and that the referring agency has explored and exhausted all available known resources. Prior to referral, the referring agency must ensure that his/her agency's procedures have been followed to address confidentiality issues and to share information with the CRCG.

Age is often another referral criteria. Some CRCGs serve children and youth under the age of 22, while some groups focus on adults older than 18 years of age. Still others have a more inclusive focus, serving children, youth, and adults of any age.

Referral procedures may include:

- completing and sending a referral information sheet to the CRCG chair or coordinator prior to the meeting
- chairperson arranges a CRCG meeting and sends information in advance.

It is important for the CRCG chair/coordinator to have referral/intake information available prior to the CRCG meeting so that s/he can identify as many agencies as possible who may be critical in identifying resources for the particular meeting. S/he can identify these agencies through mail, e-mail, or phone contact to stress the need for their participation in this particular meeting.



What Factors Contribute to Steady Referrals?

While a smaller number of CRCGs receive 30 or more referrals per year, most receive an average of 1-2 referrals per month. A few CRCGs receive 50 – 100 or more referrals per year. Limited community resources or funds certainly may contribute to increased referrals to a CRCG. CRCGs noted that a number of positive factors also may contribute to maintaining a successful level of referrals, including:

Relationships/Trust

- ★ There are good working relationships among agencies, and consistent follow-through with service plans.
- ★ Positive outcomes occur through the CRCG process and the process is reinforcing to participants.

Leadership

- ★ One or two agencies consistently make referrals to the CRCG.
- ★ One or two outstanding members provide leadership and help sustain the group's energy.
- ★ A strong coordinator ensures an effective working process.

Community/Public Awareness

- ★ There is consistent communication with referring agencies.
- ★ An understanding of the purpose and goals of the CRCG is enhanced throughout the community.
- ★ Information about the CRCG is shared with the public through community events such as health fairs, etc.

Creativity/Flexibility

- ★ Members demonstrate a willingness to be creative about developing and accessing resources.

Meetings

- ★ Meetings occur on a consistent basis and members are provided with meeting reminders, notification, and minutes.

Attendance

- ★ There is consistent attendance by a cohesive core group.

What Happens if Referrals are Low?

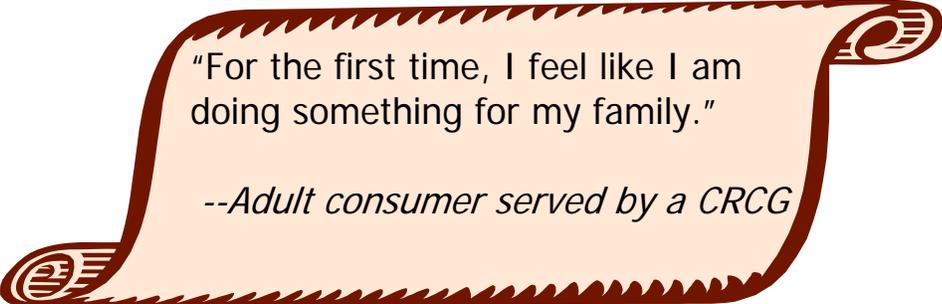
For some CRCGs, referrals may become fewer and more sporadic at times. A low number of referrals can be problematic for CRCGs. Fewer referrals may result in decreased attendance as members prioritize their time for other pressing needs, thereby, limiting the effectiveness of the CRCG in developing comprehensive service plans for any referred individual or family. As a result, the CRCG may begin meeting less frequently and the community's awareness of the CRCG and its work may be lessened. These factors may continue to result in fewer and fewer referrals. While a CRCG may continue to meet, it is not operating at its best if it is not actively engaged in developing service plans for referred individuals and families.

It is clear that there may be a number of factors contributing to fewer referrals, including both positive factors and significant challenges. Fewer referrals may occur because positive experiences with networking outside of the CRCG have resulted in the ability to serve individuals or families more comprehensively without needing to utilize the CRCG. Additionally, fewer referrals to the CRCG may be occurring because agency staff have a great deal of experience and are aware of and utilize all available resources.

While the factors indicated above may indicate strengths resulting from the CRCG process, other factors represent challenges to be addressed. Many CRCGs indicate one or more of the following as factors related to fewer referrals:

- Representatives from some mandated agencies do not attend the CRCG meetings.
- Representatives from some mandated agencies are not making referrals.
- There is limited public awareness of the CRCG and its work.
- There is limited knowledge among agencies and in the community regarding how to make a referral.
- There is a lack of confidence that needed services are available or that CRCG members will be able or willing to offer services to meet the needs of an individual or family.
- There are concerns that making a referral indicates a lack of knowledge or experience or willingness to serve an individual or family.
- The CRCG meets too infrequently to be able to develop a service plan quickly enough to be of benefit for an individual or family with immediate needs.

A comprehensive survey noted that the three most **frequent** challenging factors related to fewer CRCG referrals were lack of attendance by some mandated agency representatives, limited public awareness, and lack of agency referrals.



"For the first time, I feel like I am doing something for my family."

--Adult consumer served by a CRCG

Strategies from Local CRCGs for Increasing Referrals

Many CRCGs have identified strategies to ensure referrals continue to be received on a steady basis, or to increase the number of referrals received. Strategies include:

- Placing the topic for discussion on the agenda for the CRCG meeting to try to identify the reasons why referrals may be low and to ask for suggestions from CRCG members.
- Planning a schedule for the year, identifying one or two agencies who will be responsible for bringing situations or individuals to be served each month. Each agency knows when it will be its turn in advance and can plan accordingly, identifying and discussing the CRCG with individuals who may need interagency coordination. Each agency takes the responsibility for obtaining the needed consents and for providing the intake/referral information to the CRCG chair or coordinator before the meeting. In this strategy, there can still be room for additional referrals made by someone other than the designated agency for that month, but it ensures that at least one or two individuals will be served each month and shares the responsibility among various agencies.
- Moving the location for the monthly CRCG meeting around the county (or counties) to more equitably share the burden of travel for those agencies not located in the primary town/city.
- Having different agencies “host” the CRCG meeting as a way of sharing responsibility among members for locating meeting sites. Each “host” agency may also provide a brief overview of their services and resources available to meet the need of individuals with complex needs.

Marketing Campaign/Public Awareness

Many CRCGs have noted that marketing and public awareness strategies, designed to provide information to the community concerning the role and the existence of the CRCG, have benefited their community. Examples of these activities noted by local CRCGs include the following:

- **Strategic Planning**
 - Integrated community planning strategy to develop a community plan.
 - Annual retreat to update goals and renew CRCG.
 - Annual luncheon.
- **Coordination/Funding**
 - Seek funding for paid coordinator.
 - Location of coordinator in a hub with multiple child-serving agencies made the program more visible and accessible.
 - Availability of flexible funds.

- **Training**

- Provide CRCG & Texas Integrated Funding Initiative (TIFI) information and training.
- Presentations for community groups.
- Exhibits/presentations at Educational Service Center symposium, school transition fairs, agency/health fairs.
- Train new employees at Juvenile Court.
- Provide training for police and fire department and judges.
- Outreach to school counselors and principals.
- Piggyback CRCG presentation/workshop with other agency conferences.
- Mentoring from coordinator or chair of a more successful CRCG.
- Provide agency presentations at CRCG meetings to increase understanding of services and networking outside meeting.
- Provide agency refresher courses on CRCG.
- Develop speakers list.

- **Organization and membership**

- Consistent time/place for meeting over years.
- Increased non-mandated providers.
- Invite area ministers.
- Formalized referral/staffing process to simplify things and to encourage professionals to use CRCG.
- Formed subcommittees and workgroups to encourage everyone's participation in some aspect of CRCG.
- Outreach committee to contact absent agencies.
- Work to develop adult CRCG.
- Members who consistently attend try to have a case as a backup in case the agency responsible to bring a staffing is not able to do so.
- Target specific priority population based on community need.

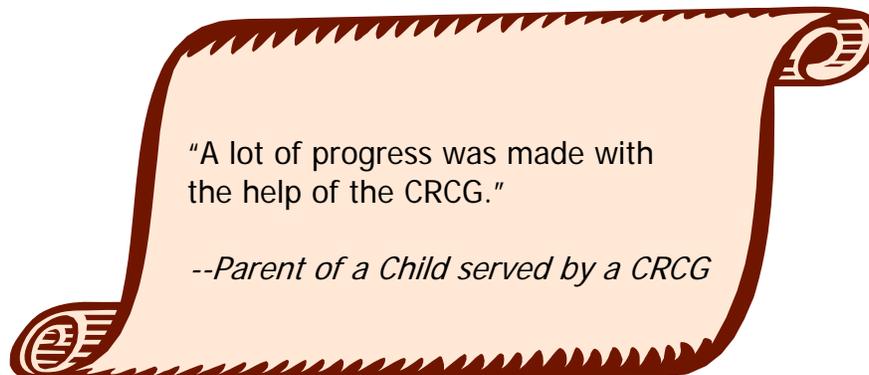
- **Communication**

- Contact mandated agencies by mail, phone, or email to attend.
- Provide a reminder notification to a CEO when there is turnover.
- Contact news for publicity: write article for paper and online news, cable channel, radio - seniors program, etc.
- Update and distribute brochures.
- Chair communicates regularly with CRCG members via email to share information and encourage attendance.
- Share information and CRCG policies with all agencies.
- Provide information via website and newsletters.
- Each agency spreads awareness to their respective counties.

Recognition and Appreciation

Feedback from local CRCGs indicates that one strategy to increase referral rates is to formally recognize and express appreciation for those individuals and agencies that participate consistently and regularly make referrals. Some examples of formal recognition and appreciation include the following:

- ★ Send letters of appreciation to thank agency executives for their participation and sending a representative on a regular basis.
- ★ Acknowledge agency/organization contributions of supplies, stamps, photocopying, and other in-kind support.
- ★ Recognize chairs for their service.
- ★ Thank participants at each meeting and remind them to spread the word to communities.
- ★ Give verbal and written acknowledgement of referrals.



THE CRCG MEETING

Developing an Individual Service Plan

Setting the Stage

The referring agency obtains consent from the child's family or the consumer or their legal representative to release information to the CRCG. The Chair, Coordinator, or a designee screens the referral information for appropriateness for a CRCG meeting. The Chair or Coordinator may choose to disseminate the necessary information to CRCG members before the meeting.

When a child or youth is referred, the child (if appropriate), child's family, or other legal representative and/or significant others are invited to the meeting. When an adult is referred, the adult is invited to the meeting as is a legal representative (if applicable). Additionally, if appropriate and desired by the adult consumer, family members and caregivers are invited to the meeting.

Introducing All Attendees

Introductions help set the tone for the CRCG meeting. Every effort should be made to make the consumer or family and other guests feel comfortable and welcome. It is often the referring member who sits with and introduces a consumer or child and family for whom the CRCG will be developing an individual service plan. Members should introduce themselves to guests and to other members by briefly identifying who they are and what agency or services they represent. Name tents and name tags are helpful for making sure everyone knows who each other is and what agency he/she represents as the meeting progresses. The chair should briefly explain to the consumer or child and family how the meeting will work and what to expect.

Presenting the Situation and Identifying Needs

The consumer or family should be invited to briefly tell their story and to identify what they need from the CRCG. If the consumer or family is not comfortable in this role, the agency member or its service coordinator/case manager may do this on the agency's behalf. This process should be planned in advance of the meeting to ensure that the consumer or family is as comfortable as possible in the meeting. Once the consumer, family, or service coordinator has spoken, it is helpful for the facilitator or Chair to summarize what is being requested and to ask the consumer or family for confirmation. For example, "I understand that you would like help in getting computer training, finding a job, and arranging transportation to and from work. You would also like help in getting child support for your children and in finding a better place to live. Is that correct? Would you like to add anything? Is there anything else you need?"

Identifying Strengths

The CRCG should work to build an individual service plan around the strengths of the consumer or child and family, and the strengths of their community. Building on individual strengths provides a stronger base for enhancing services and supports rather than focusing solely on the deficiencies.

Building the Individual Service Plan

Members build the Individual Service Plan by offering services and supports to meet the identified needs. Feedback is needed from the consumer or child's family to be certain that the proposed service, resource or action is appropriate and fits with their values, cultural beliefs, family structure, or routine. Essential information is provided for each service, resource or action, including timelines, contact information, potential costs/payment, etc.

The Individual Service Plan will also include information as to what agency or individual will take the lead in implementing the plan. Usually this will be the agency or organization that is contributing the most services or it may be the agency or organization with whom the consumer or child's family is most comfortable. The lead entity is responsible for follow-up of the plan and for reporting back to the CRCG team at designated intervals.

The CRCG team may recommend sending letters to prospective service or resource providers, court officials or others, as part of the ISP. The Chair will usually generate these letters on behalf of the CRCG.



Other Potential Functions of the CRCG Meeting

The CRCG meeting may include presentations by specific agencies to educate other CRCG members about their agency's services. The meeting may also include a discussion and strategic planning to address specific challenges or barriers identified for the community. Additionally, the CRCG meeting may discuss and plan for the development of resources needed to address identified needs for coordination of the CRCG or for a pool of funds to pay for services or supports not covered by other agencies. It is just as important to recognize and celebrate the success of the CRCG as it is to identify continuing needs and challenges. There is renewed energy to continue to address challenges when we are refreshed by the recognition that what we are doing is making a difference and is successful.

Addressing Barriers and Celebrating Successes

- Consider developing a small committee to address consistent service or resource gaps. Work might include:
 - identifying local, regional, or state resources to provide information at a CRCG meeting
 - identifying ideas for integrating resources or developing additional resources (grant writing, fundraising), etc.
 - developing public awareness strategies
 - inviting others who struggle with the same barriers to participate.
- Hold an annual celebration and recognize individuals' or agencies' exemplary participation, including:
 - meeting attendance
 - referrals
 - consistently offering services or going beyond what is expected for services
 - recording data/minutes
 - assuming a leadership role.
- Highlight the CRCG, its role, and its accomplishments in articles in the local newspaper, local newsletters, agency or organizations' newsletter/bulletins, or radio spots.

DISPUTE RESOLUTION

Individual CRCG Service Plans are generally developed upon consensus of the team members. Even when there is a high level of cooperation and coordination among members, there may be infrequent situations where disputes might arise with regard to developing an individual service plan. Possible areas of dispute might include:

- legal limitations
- ongoing supervision and follow-up of services
- scope and responsibility of an agency's role in an individual service plan
- eligibility criteria.

The Memorandum of Understanding indicates that each state agency designates a negotiator who is not a member of any local community resource coordination group to resolve disputes. The negotiator must have:

- decision-making authority over the agency's representative on the local community resource coordination group
- the ability to interpret policy and commit funds.

When two or more members of a CRCG disagree about their respective agencies' service responsibilities, the CRCG chair or designee sends the designated negotiators for those agencies written notification that a dispute exists. Within 45 days after receiving the written notification, the negotiators shall confer together to resolve the dispute.

When an interagency dispute cannot be resolved in the above manner, the dispute may be referred to the Health and Human Services Commissioner.



EVALUATION

Evaluation is not a new activity or a new concept for those of us working to improve our communities. In fact, we assess the merit of our work all the time when we ask questions, consult partners, make assessments based on feedback, and then use those judgments to improve our work. When the stakes are low, this type of informal evaluation might be enough. However, when the stakes are raised - when a good deal of time or money is involved, or when many people may be affected - then it may make sense for your organization to use evaluation procedures that are more formal, visible, and justifiable.

Some specific examples of evaluation uses include:

- Determining how satisfied consumers or families are with the process and if client satisfaction can be improved.
- Assessing community needs and wants.
- Identifying barriers to use of the program.
- Improving how things get done.
- Setting priorities for training, education, and public awareness.
- Verifying that participants' rights are protected.
- Clarifying communication.
- Enhancing cultural competence.
- Finding out which participants benefit most from the program.
- Mobilizing community support for the program.
- Determining what the effects of the program are.
- Deciding where to allocate new resources.
- Documenting the level of success in accomplishing objectives.
- Stimulating dialogue and raise awareness about community issues.
- Broadening consensus among partners about program goals.
- Gathering success stories.
- Supporting organizational change and improvement.

SERVICE PLAN DATA COLLECTION

Data is the key element in assuring information exists to answer the questions that we have identified as important in evaluating the success of CRCGs in making a difference in the lives of Texans with complex needs – one person at a time. Data provides the documentation for the work of the CRCG and is used to assist local CRCG efforts and to further statewide CRCG efforts.

Senate Bill 1468, codified in Texas Government Code §531.055 requires a legislative report every two years to the Governor of Texas and to participating agency CEOs to report the benefits and barriers of CRCG activities. Service plan data provided by CRCGs is an integral source of information for this biennial report. The biennial report required by the legislation must include:

- number of persons served through Community Resource Coordination Groups
- information on outcomes of the services provided
- a description of any barriers identified to the state's ability to provide effective services to persons needing multiagency services
- any other information relevant to improving the delivery of services to persons needing multiagency services.

Who is responsible for collecting the data?

Each CRCG determines who will be responsible for documenting the individual service plan and sharing the plan with the adult consumer or child's family, and with other team members who will be responsible for providing services and supports listed on the plan. This may be the coordinator, chair, recorder, or a person from the lead agency for that plan. A person is designated responsibility for submitting the data to the Office of Program Coordination for Children and Youth as soon after the meeting as possible (currently via the Internet for the CRCG Online data collection, or by mail, e-mail, or fax).

What is the data used for?

The Office of Program Coordination for Children and Youth produces an annual statewide data report based on the data collected by the CRCGs. The annual statewide data report(s) provides an overview of the individuals served by the CRCGs, including their identified needs, barriers experienced, services provided, agencies involved, and outcomes. Information is shared with participating state agency leaders to evaluate the CRCG system. Information is provided to CEOs within the participating state agencies and to other complementary initiatives or programs for planning purposes. Information is also utilized for the biennial legislative report to demonstrate the effectiveness of community efforts to coordinate human services and supports and to document the need for additional services and resources. The legislative report includes data related to:

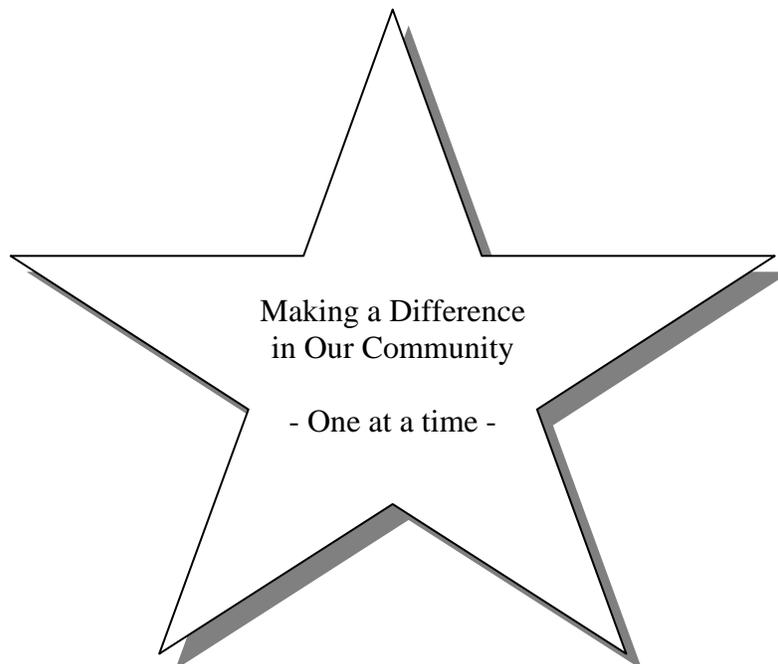
- number of persons served through Community Resource Coordination Groups
- information on outcomes of the services provided

- a description of any barriers identified to the state's ability to provide effective services to persons needing multiagency services
- any other information relevant to improving the delivery of services to persons needing multiagency services.

How can the data be used in our community?

CRCG data collection also provides information for a specific regional area and/or local CRCG. Several CRCGs have utilized this information to market their local CRCG to local community leaders and to seek additional resources from various sources, including grants from foundations and corporations. CRCGs can request data reports on specific data elements by contacting the Office of Program Coordination for Children and Youth at (512) 424-6963, by fax (512) 424-6591, or by email through the CRCG website at <http://www.hhsc.state.tx.us/crcg/crcg.htm>.

The Office of Program Coordination for Children and Youth also prepares quarterly data reports for each CRCG providing a summary of data submitted for that quarter. The report offers a "check and balance" to local CRCGs and the State Office to confirm receipt and entry of the service plan data submitted by that CRCG.



OFFICE OF PROGRAM COORDINATION FOR CHILDREN AND YOUTH

The Office of Program Coordination for Children and Youth supports the county-based CRCG process by:

- Providing technical assistance to local CRCGs through facilitating CRCG training, sharing information on promising practices from CRCGs across Texas, recommending improvements for CRCG operations, and disseminating relevant information.
- Providing technical assistance to the State CRCG Workgroup.
- Serving as a liaison between the local CRCGs and participating agencies.

Products and resources:

- Website – <http://www.hhsc.state.tx.us/crcg/crcg.htm>
- Regional and State Conferences
- Brochures
- Videos - CRCG Training Series and CRCG Marketing Video
- Joint Memorandum of Understanding – 2001
- CRCG Handbook – Revised 2005
- New Member Guidebook – Revised 2005
- Guide for New Chairs – Revised 2005
- Bi-annual Reports
- Evaluation of the Pilot Community Resource Groups for Adults (CRCGAs) of Texas (Texas A&M University) - 2000
- Evaluation of the Community Resource Coordination Groups (CRCGs) of Texas (University of Texas at Austin) – 1999
- Recommendations for Adult Community Resource Coordination Groups. Susan Stone - 1998

Office of Program Coordination for Children and Youth

P.O. Box 13247, BH-4100

Austin, Texas 78711

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www.hhsc.state.tx.us/crcg/crcg.htm

APPENDICES

1. Basic Infrastructure

1.1. Texas Counties Map (Health and Human Services Regions) and Chart

1.2. Texas Government Code § 531.055

1.3. Joint Memorandum of Understanding

2. Resources for Developing a New CRCG

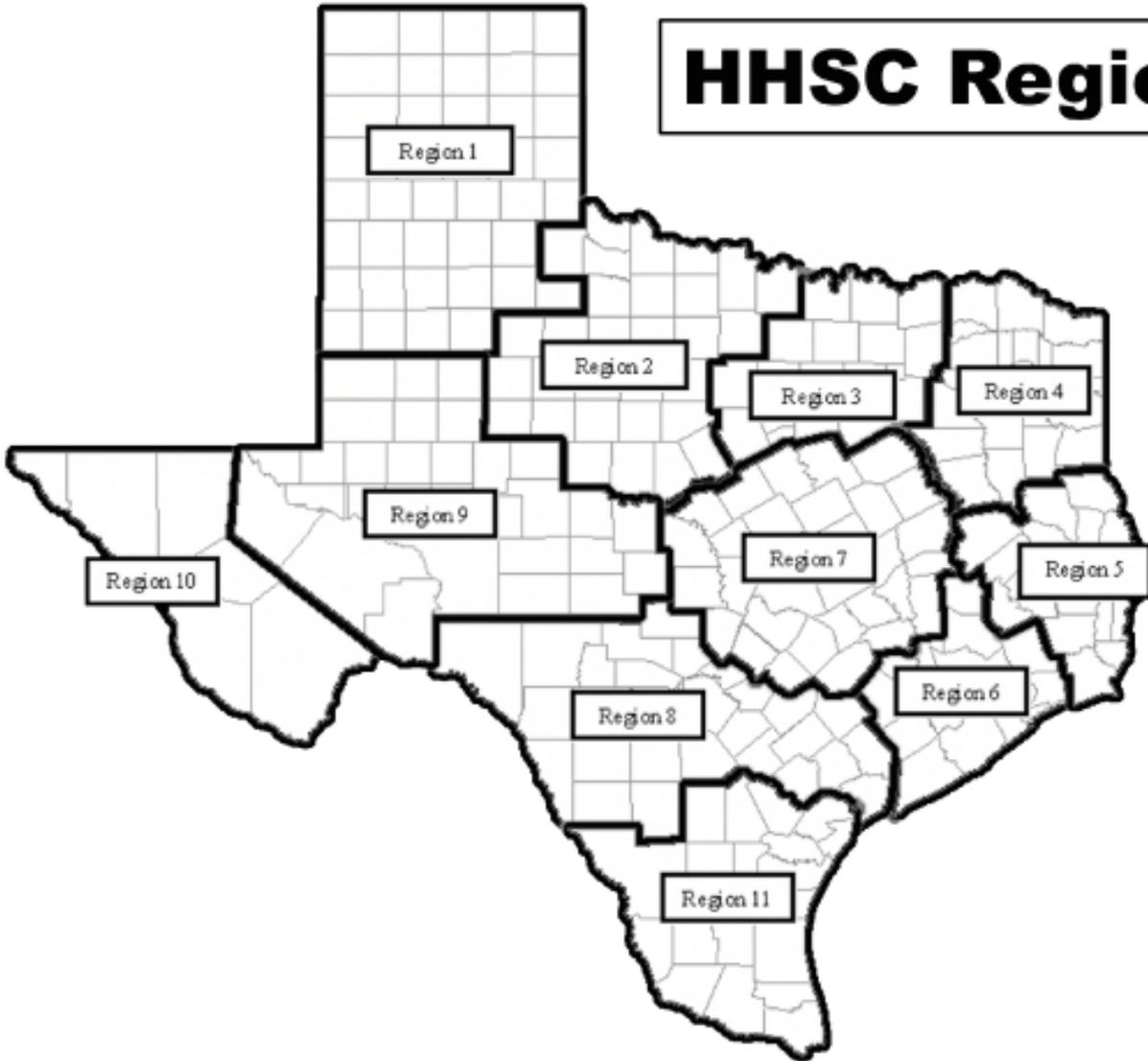
2.1. Sample Letter of Invitation to Organizational Meeting

2.2. Sample Agenda – Organizational Meeting

2.3. Sample Referral Criteria and Procedures

Basic Infrastructure

HHSC Regions



Sec. 531.055. MEMORANDUM OF UNDERSTANDING ON SERVICES FOR PERSONS NEEDING MULTIAGENCY SERVICES.

- (a) Each health and human services agency, the Texas Correctional Office on Offenders with Medical and Mental Impairments, the Texas Department of Criminal Justice, the Texas Department of Housing and Community Affairs, the Texas Education Agency, the Texas Workforce Commission, and the Texas Youth Commission shall adopt a joint memorandum of understanding to promote a system of local-level interagency staffing groups to coordinate services for persons needing multiagency services.
- (b) The memorandum must:
 - (1) clarify the statutory responsibilities of each agency in relation to persons needing multiagency services, including subcategories for different services such as prevention, family preservation and strengthening, aging in place, emergency shelter, diagnosis and evaluation, residential care, after-care, information and referral, medical care, and investigation services;
 - (2) include a functional definition of "persons needing multiagency services;"
 - (3) outline membership, officers, and necessary standing committees of local-level interagency staffing groups;
 - (4) define procedures aimed at eliminating duplication of services relating to assessment and diagnosis, treatment, residential placement and care, and case management of persons needing multiagency services;
 - (5) define procedures for addressing disputes between the agencies that relate to the agencies' areas of service responsibilities;
 - (6) provide that each local-level interagency staffing group includes:
 - (A) a local representative of each agency;
 - (B) representatives of local private sector agencies; and
 - (C) family members or caregivers of persons needing multiagency services or other current or previous consumers of multiagency services acting as general consumer advocates;
 - (7) provide that the local representative of each agency has authority to contribute agency resources to solving problems identified by the local-level interagency staffing group;
 - (8) provide that if a person's needs exceed the resources of an agency, the agency may, with the consent of the person's legal guardian, if applicable, submit a referral on behalf of the person to the local-level interagency staffing group for consideration;
 - (9) provide that a local-level interagency staffing group may be called together by a representative of any member agency;
 - (10) provide that an agency representative may be excused from attending a meeting if the staffing group determines that the age or needs of the person to be considered are clearly not within the agency's service responsibilities, provided that each agency representative is encouraged

- to attend all meetings to contribute to the collective ability of the staffing group to solve a person's need for multiagency services;
- (11) define the relationship between state-level interagency staffing groups and local-level interagency staffing groups;
 - (12) provide that records that are used or developed by a local-level interagency staffing group or its members that relate to a particular person are confidential and may not be released to any other person or agency except as provided by this section or by other law; and
 - (13) provide a procedure that permits the agencies to share confidential information while preserving the confidential nature of the information.

Specifies that the agencies that participate in the formulation of the memorandum of understanding shall consult with and solicit input from advocacy and consumer groups.

Requires that each agency shall adopt the memorandum of understanding and all revisions to the memorandum. The agencies shall develop revisions as necessary to reflect major agency reorganizations or statutory changes affecting the agencies.

Requires that the agencies shall ensure that a state-level interagency staffing group provides a biennial report to the executive director of each agency, the legislature, and the governor.

Provides for the information that must be in the report, including, but not limited to:

- (1) the number of persons served through the local-level interagency staffing groups and the outcomes of the services provided;
- (2) a description of any barriers identified to the state's ability to provide effective services to persons needing multiagency services; and
- (3) any other information relevant to improving the delivery of services to persons needing multiagency services.

For the latest Memorandum of Understanding for Coordinated
Services to Persons Needing Services from More than One

Agency, please visit the CRCG website at

<http://www.hhsc.state.tx.us/crcg/RelatedLegislation/mou.html>

Resources for Developing a New CRCG

Sample Letter of Invitation

Agency letterhead

Date

Dear

Have you ever been involved with a person whose needs are not clearly met by one agency or who is being passed back and forth from agency to agency? Or, worse yet, the individual doesn't have the "right" diagnosis for certain programs or services. Have you ever wished there were a way for service providers to come together as is currently happening for children with complex needs through the Community Resource Coordination Group for Children and Youth to plan for services with these adults and their caregivers before they slip through the cracks of the system?

Around the state, counties are developing Community Resource Coordination Groups for Adults (CRCGA). CRCGAs are local interagency groups composed of public and private agencies that develop service plans with adults whose needs can be met only through interagency coordination and cooperation. At this time, there are 27 active CRCGAs serving about 73 counties around Texas. Other counties are beginning to plan to develop a CRCGA to meet the needs of adults with complex needs in their county(ies). In some areas, the CRCGA is combined with the CRCG for Children and Youth, taking a broader-based family approach. In others, the CRCGA is a separate group comprised of adult-serving providers and consumers.

Sixteen health and human service agencies state agencies serving children and adults with complex needs have entered into an agreement to work together with local entities to facilitate the development (and ongoing support of) Community Resource Coordination Groups for children, youth, and adults across Texas.

We would like to invite you to an organizational meeting on *(insert date, time , place)*. The purpose of the meeting is to learn more about CRCGAs in other counties and to discuss the possibility of establishing a CRCGA for *(insert county/counties name(s))*. We will talk about the specific challenges in our area and Beverly MacCarty, State CRCGA Technical Coordinator, will share information about CRCGAs, how they are working in other counties, and what they do to help communities.

As a leader in this community and as an agency serving adults in this community, your participation in this effort is needed. If you are unable to attend, please send someone else to represent your agency.

We look forward to seeing you on *(insert time/date/place)*. Please RSVP *(insert name/phone number/email)* by *(insert date for RSVP)*.

Please mark your calendar and help us work toward assisting adults with complex needs to get the help they need within their communities before the situation becomes unsolvable.

By building trusting relationships and working partnerships, CRCGAs are doing together what no one agency could do alone:

Making a difference in the lives of Texas adults with complex needs - *one at a time.*

Sincerely,

(insert name(s)/signature(s)
Agency(ies)

CRCG/CRCGA DEVELOPMENT MEETING

DATE

Time

Place

A G E N D A

Welcome and Introductions

What is CRCG for Adults? Models and Options

Who are the "players"?

What is the Process?

Case Scenarios

Leadership Team (3 people)

Regular meetings

How will the Team get referrals?

Considerations/Decisions

Next Steps

Close

Community Resource Coordination Group For Families

Policy And Procedures

Sample

1) Definition and Role

The Community Resource Coordination Group for Families (CRCGF) refers to a specific group of public agency and private sector representatives who are challenged with the task of securing services for families and individuals of any age who need services from more than one entity and cannot access those services.

The group is to develop an agreement for coordination of services for the family or individual through community level programs. It is to develop a coordinated plan for services. It is not a detailed staffing plan as required by many service entities.

2) Model and Guiding Principles

The CRCGF adheres to the State CRCG/CRCGA model and guiding principles.

3) Attendance and Participation

All participating entities agree that attendance at the CRCGF meeting is important. Meeting the needs of persons referred to the CRCGF requires the cooperation and participation of all members of the CRCGF. Attendance and participation at every meeting is strongly supported and encouraged.

4) Membership

Membership in the CRCGF is composed of public and private sector entities and state agencies. Representatives for these entities are appointed internally and must have the authority to commit services or resources for their agency. At a minimum, resources include time and services. Sometimes the designated representative will not be the person most familiar with the individual or family referred by his/her agency. It is appropriate for another member to attend the CRCGF to present relevant information or to attend with the referred family or individual.

5) Confidentiality

- a. The CRCGF meetings are open, however, CRCGF staffings are restricted to representatives who are members of the CRCGF.
 - b. All information shared in the CRCGF is confidential. Each member is bound by the confidentiality rules of his or her own entity. Information obtained at the meeting is not to be shared outside the CRCGF except as needed internally to secure resources for the family or individual.
 - c. Every CRCGF participant who has relevant information regarding the referred family or individual is to secure a release to share information at the meeting. Every effort must be made to secure the needed releases prior to the meeting so each CRCGF participant can contribute their information to the staffing.
 - d. All participants shall sign confidentiality statements prior to the staffing
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6) Officers and Responsibilities

- a. Officers of the CRCGF shall be the Chairperson, Co-Chair and Recorder. The Co-Chairperson shall assume the duties of the Chairperson in the absence or unavailability of the Chairperson. The Recorder will assume this responsibility in the absence of the Chairperson and Co-Chair.
- b. Terms of office are one (1) year, and officers may be re-elected by the membership. Elections will be held during the August meeting and terms begin in September of each year.
- c. The Chairperson shall:
 - 1) preside at all meetings;
 - 2) orient new member entities of the purpose, policies and procedures of CRCGA;
 - 3) ensure that appropriate consents have been obtained by the referring entity.
 - 4) ensure that a service plan is developed, designating the representative responsible for ensuring that the plan is followed.
- d) The Co-chairperson shall assume the duties of the Chairperson in the absence or unavailability of the Chairperson, or as requested and will transition to Chairperson after one (1) year.
- e) The Recorder will be responsible for taking notes of the meetings and shall assume the duties of Chairperson in the absence or unavailability of the Chairperson and Co-Chairperson.

7) Meetings

Meetings of the CRCGF will be held on the first Thursday of each month. Emergency meetings may be scheduled as needed by contacting the Chairperson. All participating entities will be responsible for any expenses associated with their representative's participation in the CRCGF.

8) Staffing/Criteria for Referral

CRCGF referrals for staffing may be received from a member or individuals or families whose needs can only be met by interagency cooperation. Staffings will be open to all members.

Because of the time factor involved in a staffing, each member should develop an internal system for referral to the designated CRCGF member. The primary objective is to not refer individuals or families whose needs can be met by assertive exploration of resources currently available. Internal referrals to the designated CRCGF member should include information on service barriers for the family or individual. The CRCGF member or another designated member must review the case for appropriateness for a CRCGF staffing.

Prior to referral to the CRCGF, the member shall take the following steps:

- a) Explore existing resources within and outside their organization;
- b) Consult with their representative to the CRCGF;
- c) Complete the local CRCGF referral procedure.

9) Responsibilities of Referring Entity

- a) To assess criteria for eligibility and contacting the Chairperson or designee to schedule a staffing;
- b) To ensure the required document(s) for sharing confidential information has been completed prior to the meeting; if the client has a guardian, ensure that individual has signed all appropriate documentation;
- c) To ensure the individual and/or family, guardian, advocate, or other involved individual(s) are present for the staffing;
- d) To provide information to the entities present on the needs of the individual or family including resources that have been accessed both successfully and unsuccessfully, natural support systems and strengths, and any barriers to achieving desired outcomes.

10) Responsibilities of Lead Entity

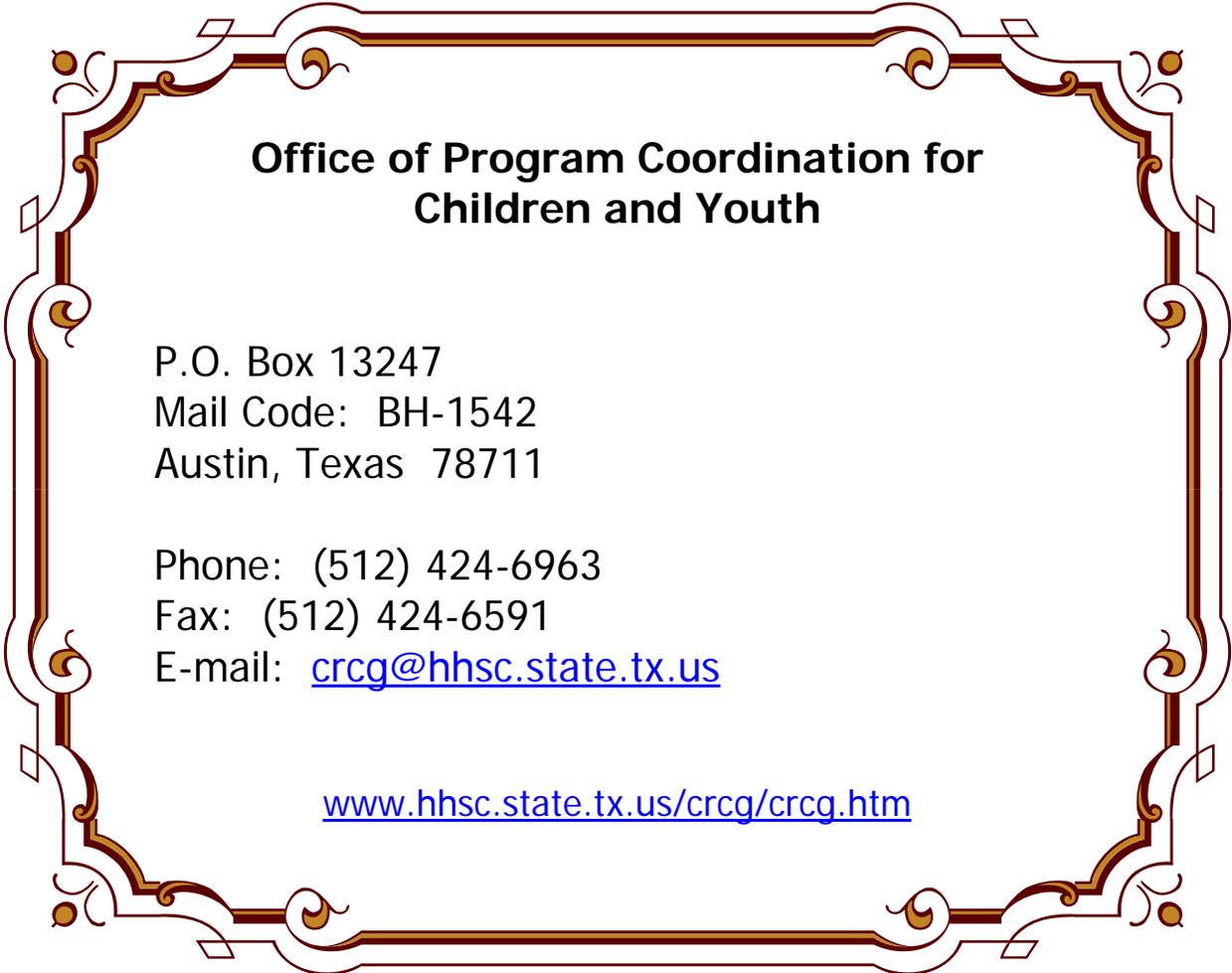
To ensure the development and implementation of the service plan, including the coordination and monitoring of services among all involved entities within the planned timelines.

11) Responsibilities of the CRCGF

- a) To discuss and prioritize the unmet needs of the family or individual based on information presented during the staffing;
 - b) To identify additional resources available to address the unmet needs;
 - c) To incorporate the needs and available resources in a service plan, identifying persons responsible for implementing strategies in the plan, timelines for completion and plans for follow up review;
 - d) To identify inadequacies or gaps in services and resources;
 - e) To develop plans and/or make recommendations to public and private entities for alleviating service gaps or improving services.
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12) Record Keeping

- a) The Chairperson or designee will maintain a roster including the name, mailing address, Email address and telephone/fax numbers of the CRCGF membership and will distribute it as needed/requested;
 - b) The referring entity will maintain the original service plan in the Client record. Other entities involved with the client may maintain a copy of the service plan or incorporate information, e.g. specific goals/objectives relative to services provided by the entity, as part of their records as required or appropriate.
 - c) The recorder will be responsible for maintaining official records for up to three years unless there is a legal reason to destroy these at an earlier time. All other copies of staffing records will be destroyed by the Record Keeper.
 - d) The Recorder will complete all reports to the State CRCG Office.
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