

# GUIDE FOR NEW CHAIRS

## OF CRCGs



COMMUNITY RESOURCE COORDINATION GROUPS OF TEXAS



for  
CHILDREN AND YOUTH  
FAMILIES  
and  
ADULTS



# ❧ Acknowledgements ❧

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We thank those members of the State Teams who edited this manual and whose insightful comments and thoughtful edits have contributed significantly.

We are grateful to Cartoonist Randy Glasbergen for permission to use his cartoons in this Guide. This is copyrighted material; therefore it should not be used outside this document without Mr. Glasbergen's permission. Mr. Glasbergen's website is [www.glasbergen.com](http://www.glasbergen.com).

## *Preface*

As used in this Guide, "CRCG" (Community Resource Coordination Group) refers to CRCGs for Children and Youth, CRCGs for Families, and CRCGs for Adults.

# GUIDE FOR NEW CHAIRS

OF

## COMMUNITY RESOURCE COORDINATION GROUPS

*To lead people, walk beside them...*

*As for the best leaders, the people do not notice their existence.*

*The next best, the people honor and praise.*

*The next, the people fear;*

*And the next the people hate...*

*When the best leader's work is done, the people say,*

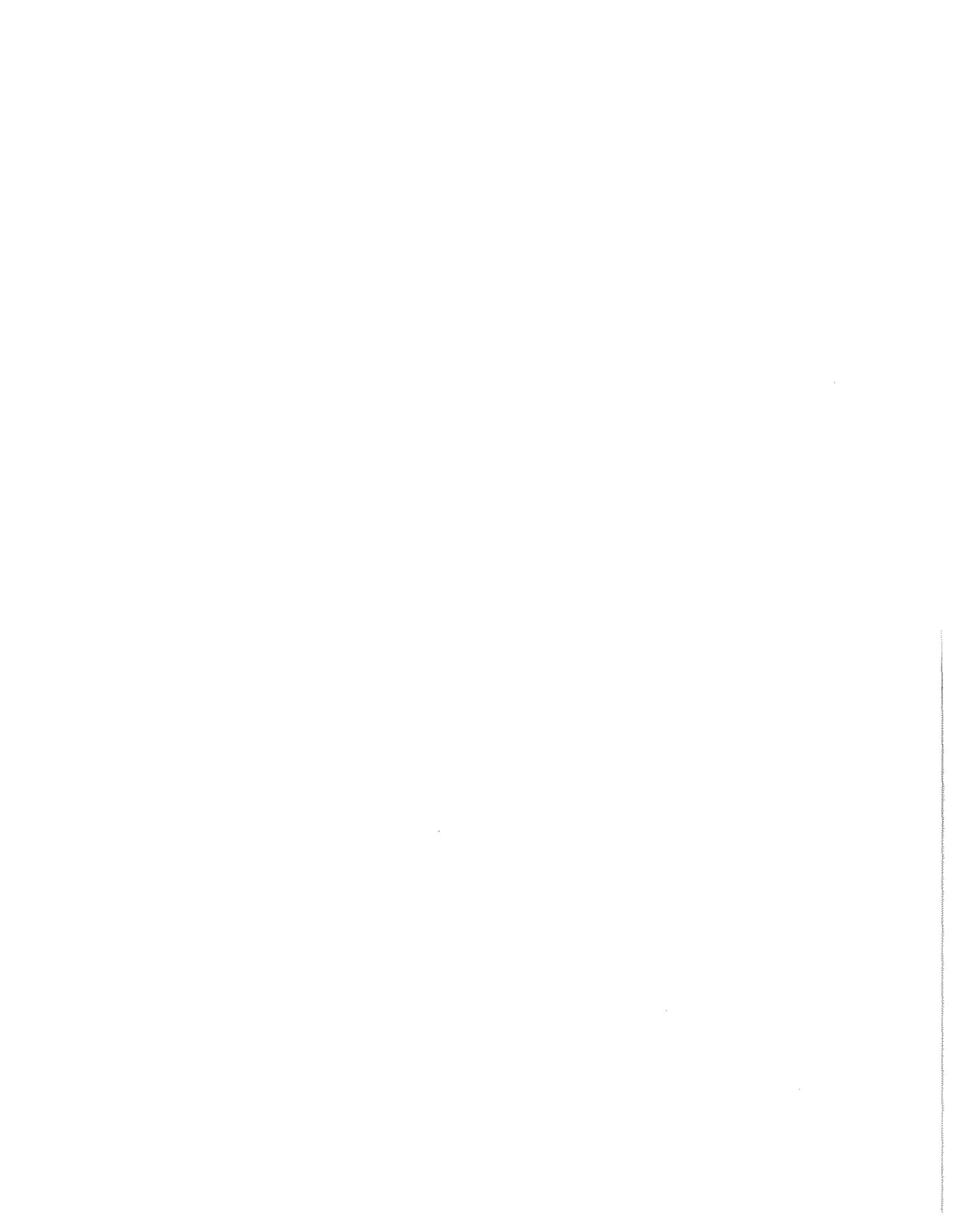
*“We did it ourselves.”*

*Lao Tzu*

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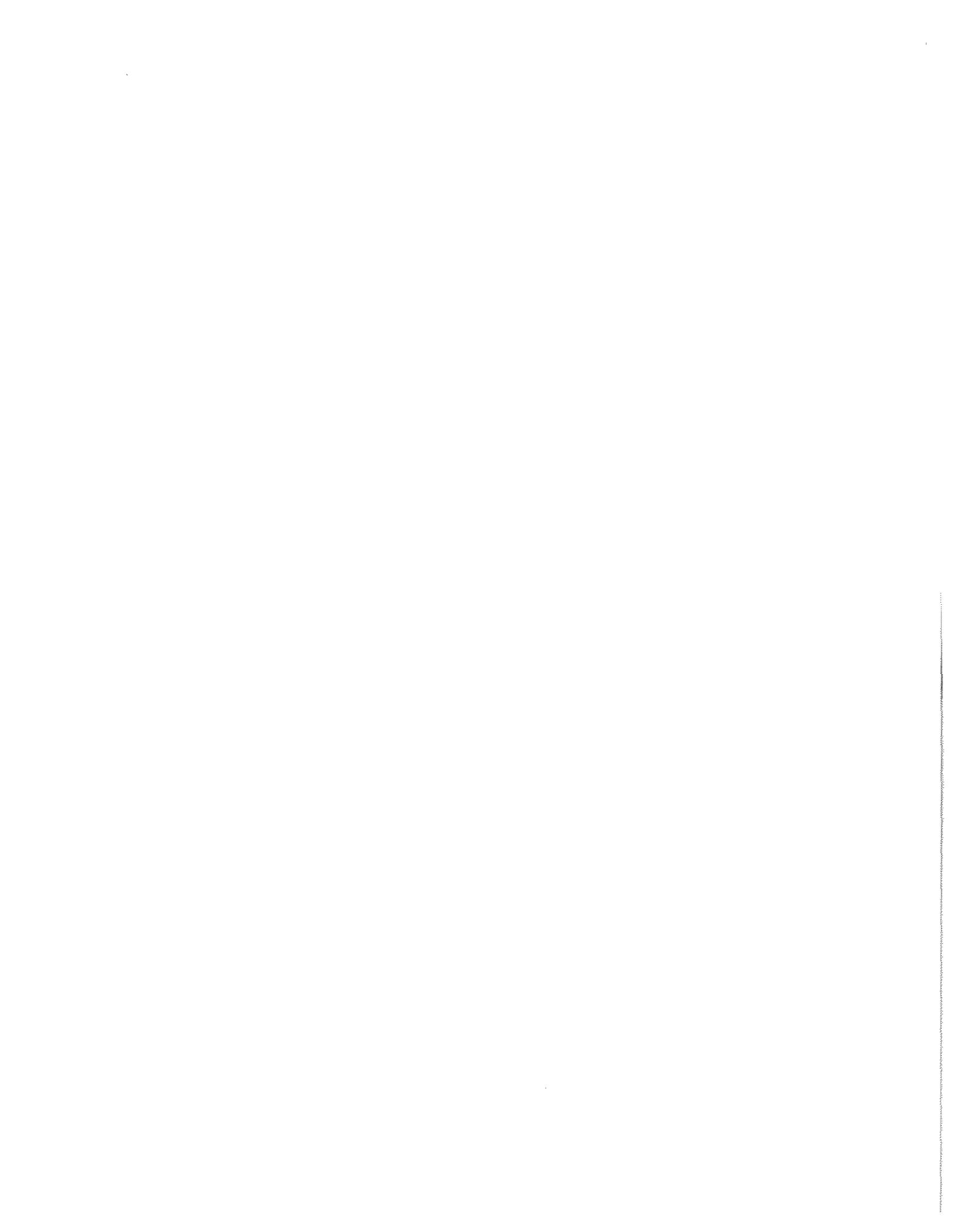


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# CRCG NEW CHAIR GUIDE



## INTRODUCTION

**Only a life lived in service to others is worth living.**

*Albert Einstein*

**C**ongratulations! Your colleagues have put their faith in you to lead the CRCG for the coming year. Your community and county(ies) will look to you to lead this worthwhile interagency process of coordinating resources for Texans who may fall through the cracks of the service delivery system. While this promises to be a challenging year, it can be most rewarding to you and to your CRCG.

This Guide is intended to provide tips, tricks and suggestions to help you succeed in your new role. This Guide does not have all the answers – in fact, nothing in this Guide is sacred. You alone will be in charge of inventing your role as Chair using whatever resources are available to you. We hope this Guide will assist you on this journey.

The Leadership Guide has three sections: The Meeting; Leadership; and Problem Solving. The order is not based on importance, but rather, pragmatism. Setting up and running the CRCG meetings is the focal activity of the Chair. The first one for which you will be responsible will probably occur within a month of your election. Therefore, the first section provides practical advice for preparing for and facilitating a CRCG meeting.

The second section addresses leadership. While meetings may be the main activity, leadership is the key to the success of the CRCG. Your colleagues chose you to Chair the CRCG for the leadership you can provide.

The third section, problem solving, addresses some of the problems CRCGs have experienced and offers some suggestions for solving those problems.

This Guide is a reference tool. While it can be read cover to cover, you can enter at any point to get the specific information you may need at the time.

Additional information, tools, suggestions and ideas can be found on the website at [www.hhsc.state.tx.us/crcg/crcg.htm](http://www.hhsc.state.tx.us/crcg/crcg.htm) or by calling the Office of Program Coordination for Children and Youth at (512) 424-6963.



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### **SELECTING A CRCG CHAIR**

The selection of a Chairperson is among the most important tasks a CRCG undertakes. The selection of leadership for the interagency team is crucial to the success of the CRCG process. The leader must be able to commit time, skills and energy to support the group. At the same time, the Chairperson must also have a deep personal commitment to coordinating resources in a collaborative effort to help individuals with complex needs.

#### ***Defining the selection process***

How the CRCG selects its leaders, including the Chair, is a decision made by the CRCG. Each CRCG has a different way of doing business. Some CRCGs schedule annual elections and elect their leader(s) at a specified monthly meeting each year. Others rotate the Chair among agency members every year. Still others treat the co-chair or vice chair as a Chair-Elect who assumes the role of Chair the following year. Some CRCGs have the same person Chair for as long as they are willing. Even in this case, an annual election to reaffirm the support of the group is a good idea.

#### ***Finding the right chairperson***

The Chair should generally be a seasoned member of the CRCG. Members should consider carefully whom they elect as Chairperson. One method is to ask for volunteers for the Chair position. Another is to ask members to nominate a Chair. Yet another method is for the CRCG to identify the qualities they would find helpful in a Chairperson, then asking a nominating committee to make recommendations to the full CRCG. Following nomination, the full CRCG elects the Chair.

#### ***Length of term***

The CRCG Guiding Principles recommends that the terms for the officers be re-evaluated annually. The CRCG will need to determine if a Chair can be re-elected.

Some CRCGs have become more structured and adopted local bylaws or guidelines that include rules for the election of officers. Some groups like the formality of having specific guidelines on elections because they don't have to worry about how they will elect their new Chairperson the following year.

# THE MEETING

**A spirit of fun should pervade every meeting because it helps people participate and learn.**

*Gene Perret*

The meeting is the central activity of the CRCG. In most instances, it is at the monthly CRCG meeting that the coordinated individual service plans (ISPs) are developed. In some cases, emergency meetings will be held to develop ISPs. It is at these meetings that the customer entrusts his or her story to the members of the CRCG, and that the referring member seeks the support of colleagues. It is during these meetings members commit to provision of service, commit to coordinating their efforts, designate a lead agency, and commit to collaboration with the lead agency in serving the customer through implementation of the ISP.

In addition, at the monthly meetings the CRCG establishes or modifies its operating procedures, sets and modifies its policies, and follows-up on ISP implementation progress. At the monthly meetings CRCGs welcome new members and address system changes educed by needs and barriers identified in ISP development.

A key role of the Chair is to insure the CRCG's meetings are effective and efficient. This will require:

- developing a workable agenda;
- managing the meeting effectively; and
- reflecting on the strengths and weaknesses of each meeting.

## **PREPARATION**

Most of the work required for effective meetings occurs before the meeting takes place.

### ***Preparing the agenda***

The agenda is the road map for the meeting. A well thought out, carefully constructed agenda will help insure the meeting runs smoothly and accomplishes what is needed. All the members of the CRCG should be afforded the opportunity to provide input into the development of the agenda.

A standard agenda format should be developed by consensus of the CRCG. This standard format will lay out the items needing to be addressed at each monthly meeting and the order in which they will be considered. This agenda format should be revisited from time to time to be sure it continues to meet the needs of the CRCG, its members, and, especially, its customers.

The standardized agenda format greatly benefits the Chair because assembling the agenda each month becomes a matter of simply "filling in the blanks" for each meeting.

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To insure that members have a sufficient opportunity to provide input into the development of the agenda, several approaches may be used including:

- Asking for agenda items for the next meeting at the conclusion of the current meeting;
- Keeping an open invitation to members to suggest agenda items until a specified date before the next meeting;
- Having an agenda committee prepare each month's agenda; and
- Reviewing the agenda at the beginning of each meeting and providing the opportunity to amend the agenda.

### ***Screening the customer***

A process needs to be set in place to screen customers referred to the CRCG:

- to determine whether this is an appropriate referral;
- to see that the information needed is complete and comprehensible;
- to insure that all necessary releases have been executed by the customer or the customer's representative; and
- to identify both CRCG members and others who will be important to developing the ISP.

The screening is generally done by the Chair, although other approaches can be used. The screening could be assigned to another member of the CRCG team. A screening committee could be established. One CRCG is developing a criteria sheet to be used by the referring agency to self screen.

Those customers who are found appropriate for the CRCG are placed on the agenda.

### ***Notifying members***

Maintaining a high level of participation by members at meetings is crucial to the success of the CRCG. This can be helped by routinely notifying members of the next meeting, even though the meeting is regularly scheduled each month.

Meeting notices can be provided by postcard, e-mail, fax and or phone. Many CRCGs notify members in writing a week before and follow-up with a phone call a day or two before the meeting. While this may be done by the Chair, notifying members can be assigned to another member. The Secretary is a logical choice.

One might think, "This is a regularly scheduled meeting that the professionals should have on their calendars. They shouldn't need a reminder notice." The reality is that with all kinds of groups composed of all kinds of people attending all kinds of meetings, attendance is better if reminders are given.

Special attention should be given to encouraging attendance of those CRCG members whose organizations may have something to contribute to an ISP to be developed at the upcoming meeting.

Some CRCGs encourage member organizations to appoint “alternates” who can attend CRCG meetings if the regular member will be absent. Members should be strongly encouraged to call if they must be absent from a meeting.

### *Inviting others*

Invitations need to be extended to non-members of the CRCG who may have something to contribute to a particular ISP.

### *Preparing materials*

Any materials needed for the meeting should be prepared and assembled prior to the meeting. These may include:

- minutes of the previous meeting;
- sign in sheets;
- customer information packets;
- confidentiality forms;
- name tags;
- name tents;
- easel pads; etc.

These tasks can be assumed by the Chair or delegated to another member.

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### **AGENDA**

The agenda is the road map for the meeting. By carefully constructing and following the agenda, the meeting can flow efficiently and all the important items can be addressed.

Following is a sample agenda. The times at the left are suggestive and often are not included on the agenda as distributed. It is helpful for the Chair to have a "guesstimate" of the time needed for each item in order to keep the meeting moving. You will need specific start times for each of the ISP meetings as a courtesy to the customer and others who may attend that part of the meeting.

Some CRCGs do, in fact, establish time limits for each agenda item and appoint a timekeeper to keep the meeting on task.

| <b><i>Sample CRCG Monthly Meeting Agenda</i></b> |  |
|--|--|
| 20 min   | <b>I. Introductions and announcements</b>  |
|  | <b>II. Agenda Review</b>   |
| 30   | <b>III. CRCG business meeting</b>  |
|  | <i>A. Minutes</i>  |
|  | <i>B. Other items of discussion (operating procedures, funding, systems change, increasing public awareness of the CRCG, recruiting new members, etc.)</i> |
| 30 each  | <b>IV. Individual Service Planning Meeting(s) ISP(s)</b>   |
| 30   | <b>V. Follow-up reports</b>  |
|  | <i>A. One month</i>  |
|  | <i>B. Three month</i>  |
|  | <i>C. Six month</i>  |
|  | <i>D. One year</i>   |
| 30   | <b>VI. Education presentation*</b>   |
| 10   | <b>VII. Adjourn</b>  |

\* Some CRCGs include an educational presentation as part of their monthly CRCG meeting. Some include it only if the number of ISPs scheduled permit the time. The educational presentation may include: a presentation on a program offered by a member agency; a program presentation by a non-member agency; sharing of a new community initiative by an invited guest; a presentation on interagency collaboration by an invited guest; etc.

### MANAGING THE MEETING

Effectively managing the meetings is key to the success of the CRCG. Effectively managed meetings will:

- Help maintain the active attendance and participation of the members;
- Insure that the important items are brought to resolution;
- Insure that all participants are clear about expectations; and
- Help everyone leave with a sense of accomplishment and time well spent.

Essential elements of a well-managed meeting include keeping the meeting moving and on subject, orderly discussion of issues, and firm consensus on resolution of issues.

#### *Setting ground rules*

One effective tool for managing meetings is to have a clear, agreed upon set of ground rules. These ground rules should be developed and agreed to by the CRCG as a team, should be written down, and should be prominently posted at each meeting.

### **Sample Ground Rules**

1. Meetings will start and end on time.
2. Avoid personal attacks and the use of labels.
3. Listen with understanding to what others have to say.
4. Avoid "side bar" conversations.
5. Encourage everyone to participate.
6. Monitor your own "air time."
7. Don't interrupt.
8. Stay on subject; stick to the agenda.
9. Be concise, don't repeat others.

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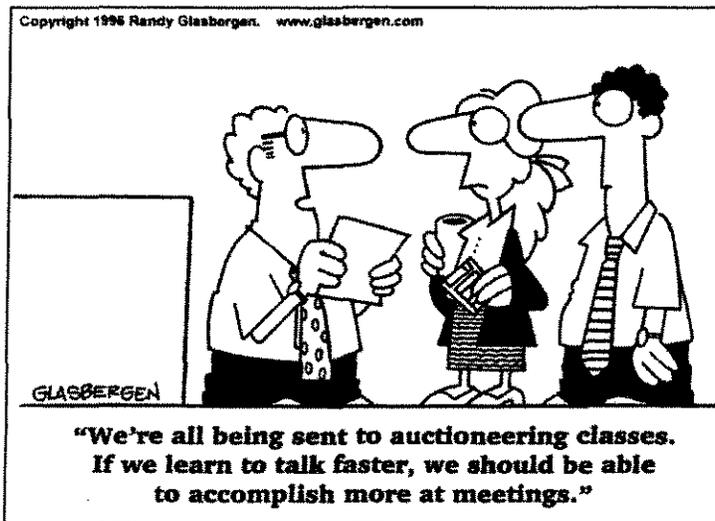
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### ***Keeping time***

One of the quickest ways to impede participation in a CRCG meeting is to start late, end late, and get hung up on one or two items on the agenda.

Starting on time is often a significant challenge to a meeting Chair. If the meetings do not consistently start on or near the established starting time, members, who are generally very busy people, come later and later in order not to waste their time waiting for others. As a result, the start time keeps slipping and those members who do show on time become increasingly discouraged. Some ideas which might help keep the start time firm are:

- As Chair, be sure you are present at least 30 minutes prior to the start of the meeting. Be sure the meeting room is set up well before the scheduled start time.
- Establish a strong expectation that meetings will start on time. This can be done by starting at the appointed time regardless of who is present.
- Ask members to call you the day before the meeting if they will be late.
- Have a half-hour informal networking time prior to the meeting with snacks. Food is always a good draw. Encourage members to come early to have time to meet each other informally. Have members take turns bringing the snacks.
- If a particular member is consistently late, you may want to meet with the member to discuss your concerns and discover ways to assist the member to be more timely.
- If lateness to the meeting is a consistent problem, put it on the agenda for discussion at a meeting and have the members develop a plan to solve the problem.



Keeping the meeting moving is the responsibility of the Chair. Start by having a good idea of how much time to spend on each agenda item. Be clear what needs to happen with each agenda item. Is it just for discussion or is a formal decision needed? Discussion items can be brought to a close, continued to a future meeting, or assigned to a committee for more specific work and recommendations. Items requiring decisions need to be led to a conclusion. To the extent possible, reach closure on all the agenda items.

Ending the meeting on time is crucial.

Members schedule their day around the CRCG meeting and generally have appointments or assignments needing their attention after the meeting. If meetings consistently end late, members will increasingly set their own end times and more and more members will drift away before the end of the meeting.

Getting to the end of the meeting at the prescribed hour depends, in part, on starting on time and, in part, on effective meeting management. Prior to the meeting, it is important for you, as Chair, to determine which agenda items are most important and are most urgent. (Urgent items are not necessarily important, but may not wait until a future meeting.) If it becomes apparent that the meeting will run late, some agenda items may be cut or deferred to the next meeting with the consent of the members.

If maintaining time discipline is a challenge for your CRCG, you may consider setting times for each agenda item and appointing a timekeeper. This generally should be agreed upon by the entire CRCG in order to insure that the members buy into this. The timekeeper should be given specific instructions (e.g. "give us a five minute and a one minute warning as the end time for an item approaches").

### *Guiding the discussion*

Guiding a discussion does not mean leading it to the conclusion you want; it means keeping it on subject, minimizing repetition of points already made, and moving the discussion toward closure.

One of the dangers to clear, focused discussions, is chasing "rabbits." Rabbits are points not on subject, even though they may be closely related. A member raises a point not quite on the mark. Another member follows that up and leads the discussion a little farther from the topic of discussion. Pretty soon the discussion is chasing the rabbit into a bramble bush totally away from the topic at hand.

It is up to the Chair to bring the discussion back to the topic at hand. This must, of course, be done tactfully to keep from alienating the members enthusiastically chasing the rabbit. Some approaches to consider are:

- Maintain a "parking lot." This is a place to save ideas for future discussion. "You know, that's a great idea Pat, but I think we should pick up on what Maria was saying. Can we put this in the "parking lot" and come back to it later?" It is vitally important that, before the end of the meeting you visit the parking lot and decide what to do with the items there. If it is important and time permits, an item may be discussed at that time. It may be that when a parking lot item is mentioned, Pat will say "it's really not important, let's just drop it." It may be assigned to a committee to report back at the next meeting or it may be placed on the agenda for the next meeting. The members may decide to drop it or to refer it to another group.
- Get the help of the members. Discuss the problem of chasing rabbits. Ask the members to signify, in some agreed upon manner, when someone is chasing a rabbit.

Repeating the same point often bogs down the discussion as an individual tries to emphasize a point or can't find a way out of a loop or as members try to weigh in to support a point already made. To free an individual from repeating the same point, the Chair might say something like, "As I understand it Jan, the point you are making is...is that correct? Is there anything else you want to add?" To free the group from the "piling on" one might ask, "Does anyone have something different to add to the discussion?" or "Are there others who would like to support Jan's point? Perhaps those in support could raise your hands and we'll note it and move on to the next point."

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In order to move the discussion toward closure, it is important you have in mind the end point. Is action required by the CRCG or is it an informational discussion? If it is informational, you may ask if there are one or two final points to be made. You may ask a discussion leader for summation. If it is an action item, you may ask if someone would offer a tentative consensus. If there is no agreement, you may ask someone not in agreement to state his/her concerns or offer an alternative. This process continues until a consensus statement is offered that all can live with. If no consensus can be reached in the allotted time, you may ask the group as a whole how to proceed. Continue the discussion but drop other agenda items? Ask a committee to bring a recommendation back to the next meeting? Defer further discussion to the next meeting?

### ***Clarifying consensus***

Once consensus is reached, it is important all the members understand the decision that has been made. Sometimes after a protracted discussion, members may have different opinions of what has been decided. The Chair states the consensus and asks if all concur. If not, the Chair leads the CRCG in developing a statement of consensus with which all concur. The Secretary records the consensus as stated.

### **INDIVIDUAL SERVICE PLAN (ISP) DEVELOPMENT MEETING**

The development of the individual service plan (ISP) is the core activity of the CRCG. The first task of the Chair is to insure that the referring entity has informed the customer in detail of the process and that the customer has signed all appropriate consent forms.

A sound structure and effective management of the ISP meeting will help insure that:

- a good ISP is developed;
- the customer is honored in the process;
- commitments are clear;
- expectations are well understood; and
- follow up is ensured.

Following is a sample ISP meeting agenda.

**Individual Service Planning (ISP) Meeting**

- A. *Welcome customer and representatives*
- B. *Self Introductions by CRCG Members*
- C. *Presentation of story/situation by customer, service coordinator, caregiver or family member*
- D. *Interview by CRCG members (strengths and needs)*
- E. *Prioritization of critical needs*
- F. *Development of service plan by CRCG members and customer or family*
  - 1. Specific services offered by members
  - 2. Services integrated into plan with timetable
  - 3. Lead entity appointed
- G. *Plan summarized by chair and approved by customer or family*
- H. *De-brief by CRCG.*
  - 1. How appropriate was the referral and why?
  - 2. How did we do on the ISP process? Did we...
    - listen to the customer?
    - focus on strengths of the customer and his/her context?
    - get creative?, etc.
  - 3. What are the strengths and weaknesses of the ISP?
  - 4. What can we do to make the next ISP better?

**(Repeated for each customer)**

***Introductions***

The introductions should help set the tone for the ISP meeting and should make the customer or family and other guests feel welcome and at ease.

The referring member should introduce the guests attending the meeting for the ISP, including the customer, caregiver or family. The Chair should warmly welcome the customer and any people accompanying the customer and begin self-introductions by the members. The members should welcome the customer and introduce themselves, including the agency or organization they represent.

The chair should then explain to the customer how the meeting will work and what to expect.

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### ***Inviting involvement of customer***

The customer or caregiver(s) should be invited to briefly tell their story and state what they want from the CRCG. If the customer is not comfortable doing this, the service coordinator or case manager may do this on the customer's behalf and with the customer's consent. This should be pre-arranged to avoid embarrassment for the customer.

Following the customer's opening statement, the chair should summarize what the customer is requesting and ask the customer for confirmation. For example, "As I understand it, you would like our help in getting computer training, finding a job, and arranging transportation to get you to and from work. You would also like help in getting child support for your children and in finding a better place to live. Did I get it right? Is there anything I missed? Is there anything else you need?"

The members may ask questions of the customer or caregiver to increase their understanding of the customer's circumstances.

### ***Clarifying strengths***

The CRCG should work to build the ISP around the strengths of the customer rather than focusing exclusively on "deficits." This includes both the personal strengths of the customer and the strengths of family, friends, community, faith community, etc. Among the questions you may want to ask are:

**Strengthen me by  
sympathizing with my  
strength, not my weakness.**

*Amos Bronson Alcott*

- What is the most important thing you have ever done?
- When are you happiest?
- What are your best qualities?
- What are some activities that you enjoy?
- Are there any special values or beliefs that are important to you?
- Who do you call on when you need something?
- Who calls on you when they need something?

During this process, you will likely discover strengths upon which the customer and team can build to enhance the services planned.

### ***Building the ISP***

The members build the ISP by offering services and supports to meet the needs of the customer and building on the customer's strengths. At times, some members may need some gentle coaxing by the chair or other members to offer a needed service. When a service is offered, feedback from the customer is necessary to be certain the service is appropriate and can be delivered in the manner best suited to the customer. The time requirements of the service must be identified. When will it start? When will it end? Can it be extended? Are there pre-requisites to begin the service?

After all the services and resources have been identified and assembled into a plan, the customer or caregiver and all the providing entities need to reaffirm their agreement. Some CRCGs have each agency or organization and the customer sign a written draft of the plan.

Generally, one of the contributing entities will emerge as the lead entity. If not, the Chair may ask one of the contributing entities to serve as lead (generally the agency or organization contributing the most services) or may ask for a volunteer from among the contributing entities. The customer's case manager or service coordinator from the lead organization will oversee implementation of the service plan. The lead entity will maintain communication with the other contributing entities to help ensure services are provided in a coordinated manner. The lead entity will submit the follow-up reports to the CRCG team at prescribed intervals.

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

### ***Maintaining records***

Good record keeping is essential for the CRCG general meetings and the ISP meetings. The ISP record should include the ISP, confidential information release forms, sign-in sheets, copies of data collection forms, and any customer information made part of the ISP record. These records must be handled with great sensitivity as required both ethically and legally.

The Chair, Secretary or a designated member of the CRCG should be charged with maintaining these records. The Chair should insure that, no matter who is keeping the records, adequate security measures are in place to protect customer confidentiality.

### **REFLECTING ON THE MEETING**

A few minutes at the end of each meeting spent reflecting on the meeting itself can yield enormous dividends. As members identify strengths and weaknesses, and make suggestions for future meetings, the Chair gets vital feedback for continually improving the meetings, and the members get feedback on ways they can help in that effort.

You may consider asking, at the end of each meeting, questions such as:

- What could we do differently from what we did today to make our interagency service planning process more effective?
- What did we do today that was conducive to effective interagency planning?

Members will be more invested in the meetings if they have the opportunity to help shape them. This will help maintain the active attendance and participation of the members.



# LEADERSHIP

**Leadership should be born out of the understanding of the needs of those who would be affected by it.**

*Marian Anderson*

**T**he key to your success as Chair of the CRCG lies not so much in what you do but in how you lead. Your CRCG members will look to you for direction, guidance and commitment. Leadership means not only doing what is necessary, but supporting others in their efforts, as well. The mantle of leadership can be shared by a leadership team.

## THE LEADERSHIP TEAM

By using a leadership team approach, more can be accomplished by the CRCG while keeping the burden on any one individual from becoming too great.

The leadership team is typically composed of the Chair, a Co-Chair or Vice-Chair, and a Recorder or Secretary. While each member has a specific job to do, the leadership team can function as a unit to provide input to the Chair and guidance to the CRCG.

The Chair has overall responsibility for managing the CRCG and for facilitating the meetings of the CRCG. Usually, the Chair is an ad hoc member of all committees. The Chair serves as a sounding board for committee chairs. The Chair generally serves as the spokesperson for the CRCG to the general public and to other external audiences. The Chair is the liaison to the Office of Program Coordination for Children and Youth.

The Co-Chair facilitates meetings in the Chair's absence. The Co-Chair can assume a number of roles in the CRCG as delegated by the Chair, when agreed upon by the Leadership Team, or assigned by the CRCG as a whole. This may include screening referrals, public speaking on behalf of the CRCG, recruiting members, placing reminder calls to members, etc.

The Secretary or Recorder generally is responsible for the records of the CRCG. The secretary keeps a record of the meeting minutes, maintains an accurate, up-to-date membership roster, maintains customer records, completes the data forms for the State Office, sends meeting notices, and sends timely reminders to lead entities responsible for follow-up reports at up-coming meetings.

Together, this team manages the core tasks required of the leadership of the CRCG.

## TEAM BUILDING

Each CRCG is a team working together to help individuals in its community who are "falling through the cracks." The effectiveness of your CRCG derives from the strength of the team. The strength of the team grows from the ability of the leader.

[Teamwork] is a common struggle for the customers, not separate struggles for power.

*Peter Scholtes*

## ***CRCG NEW CHAIR GUIDE***

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A Task Force on Teaming at the Hawaii University Affiliated Program has identified the following principles for effective teams.

**One:** A team reflects its collective vision.

**Two:** A team promotes empowerment of all members.

**Three:** A team demonstrates shared decision making.

**Four:** A team demonstrates synergy. (The whole is more than the sum of its parts.)

**Five:** A team highly regards diversity.

**Six:** A team fosters the inclusion of people affected by its actions.

**Seven:** A team fosters self-determination and growth both in itself and individual team members.

**Eight:** A team operates in an interdependent and reciprocal fashion with related teams and the larger system. There is a real web of connectedness.

**Nine:** A team reflects a fluid and dynamic quality.

One tactic to assist your CRCG to work as a team is to provide the opportunity to have a CRCG strategic planning day or a retreat. You may want to pick a different meeting location from the usual gathering place, get out of “beeper range,” secure a neutral facilitator, and dress casual to address the question, “How can our CRCG be the best we can be?”

### **TRUST**

For a leader to help a CRCG embody these nine principles, the Chair must have the trust of the members. A Chair generally enjoys a level of trust at the time of election. We do not usually elect people we do not trust to positions of leadership.

The keys to trust are:

- open and honest communications with the CRCG as a whole, and with each of its members;
- building a track record of following through on commitments;
- sharing credit generously with the members of the CRCG; and
- treating the CRCG members respectfully in private as well as in public.

### **VISION**

**The very essence of leadership is that you have to have a vision.**

*Theodore Hesburgh*

The CRCG provides a wonderful opportunity to concretely demonstrate the effectiveness of interagency collaboration in solving the most difficult challenges facing the social service system in your community. The power of the leader to guide the CRCG and to effect change in the community is in direct proportion to the clarity and strength of the vision of the leader. This vision must flow from the collective vision of the CRCG and must, in turn, inform, empower, and guide the collective vision.

The first step in building your vision for the CRCG is to articulate what you want the CRCG to accomplish for your customers, for the members, and for the community. Check this vision with your team and build a consensus vision for your CRCG. Express your vision frequently at the CRCG meetings and share the vision with the community as often, and in as many ways, as possible.

### **EMPOWERMENT OF MEMBERS**

Each member's sense of power in the CRCG will significantly impact that member's participation in the CRCG. Power means the ability to be heard, the ability to influence outcomes, and the ability to contribute.

The Chair plays a pivotal role in the empowerment of the members. Effective empowerment of the members means not only increasing the effectiveness and impact of the CRCG, it means lightening the load on the Chair as the members share a greater part of the CRCG burden of work.

#### *Orienting*

The Chair plays a vital role in helping new members become full participants in the CRCG by providing an orientation prior to the first meeting. The orientation should include the history of the CRCG, the mission and activities of the CRCG, and the expectations of the members of the CRCG.

The orientation can be through a formal training, perhaps involving other members of the CRCG, or an informal meeting between the chair and the new member, perhaps over lunch.

#### *Listening*

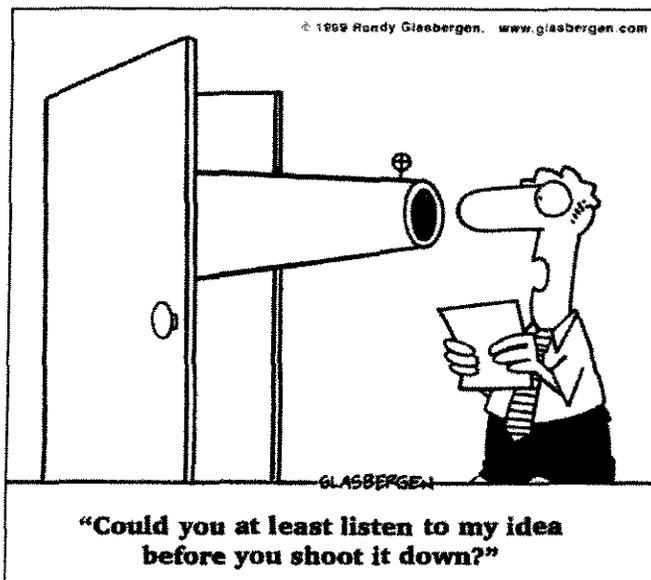
Being heard is key to feeling part of any group. The Chair must be sure that every member has the opportunity to be heard. Listening means receiving the information without judging, for judgment builds a wall between the speaker and the listener and inhibits future sharing of ideas and opinions.

An important part of listening is eliciting participation from CRCG members who may be reluctant to speak, then affirming the contributions they make.

#### *Engaging*

Effective CRCG membership requires full engagement in the CRCG. Engagement means opening one's self, contributing time, energy and talents, and committing the resources of one's agency to the ISP and to the CRCG.

The Chair facilitates engagement of the members first by example. The Chair gets to know each member and provides opportunities for the member to contribute. The Chair assists the member in educating his/her superior, if needed, and acknowledges the contributions of the member and the member's organization or agency.



## ***CRCG NEW CHAIR GUIDE***

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### ***Delegating***

Often, when we are in leadership positions, we are tempted to “do it ourselves” to “make sure it is done right,” to avoid the time and effort required to equip others to take on a task, or to avoid asking others to take on another job.

If you fail to share the load with your fellow team members, you impede the progress of the CRCG because:

- there is only so much of you to go around, so some things that could be done, won't be;
- member involvement will wane as they will not see their involvement as important to the success of the CRCG; and
- the emergence of new leadership will be stunted as opportunities to practice leadership won't exist.

What's more, you will greatly increase your risk of “burning out” and of doing it sooner rather than later.

Begin by identifying all the tasks that you do as Chair. Eliminate all the tasks that must be done by the Chair such as facilitating the meetings. Identify those tasks that could be done with little or no support from you. These will be the easiest to delegate to a committee or individual.



Next, develop a list of all the things you would like the CRCG to do but haven't had time to initiate. Again, decide which must be done by the Chair and which may be done by a member or committee.

At a CRCG meeting, present your list and welcome additional items. Have the team decide how best to assign the tasks.

**Committees or Task Forces:** Some tasks lend themselves to committees or task forces. For example, a committee may be established to screen referrals or a task force may be formed to address a system barrier. When formed, these groups should have clear expectations and chairs or conveners.

**Individual Assignments:** Individual CRCG members may be asked to perform specific functions either by the CRCG or by the Chair. Short-term simple assignments can be used effectively by the Chair to begin drawing in CRCG members who tend to remain on the periphery.

**Accountability:** Whether it is a committee or an individual, when an assignment has been made, the convener or the member should be asked about the status of the assignment at times and intervals appropriate to the task. If an assignment is not being done or is behind schedule, the Chair and CRCG should explore, with the responsible party(ies), ways to get it back on track.

*Honoring*

It is very important the contributions of the members be frequently acknowledged, praise be offered, and thanks be given. Affirming the contributions of the members lets them know they are making a difference and that they are valued by the team.

You may consider having an annual banquet or special gathering to celebrate the accomplishments of the CRCG as well as the contributions of the members, the member organizations and the agencies. This can be a “pot luck” luncheon or a “pay-your-own-way” dinner at a restaurant. Awards, elaborate or simple, may be given to recognize contributions to the CRCG.

**CELEBRATE YOUR SUCCESSES**

We tend to focus on problems to the exclusion of seeing our strengths and victories.

Problems are like sand that can slowly but surely grind us down and, over time, erode our capacity to problem solve. If we add to the sand the mortar of our strengths — individual and collective — and the water of acknowledging our successes, we form a solid concrete foundation upon which to build.

Building your CRCG team expands the power and effectiveness of the CRCG and multiplies its ability to serve the customers for whom it exists.



# PROBLEM SOLVING

**The things we fear most in organizations – fluctuations, disturbances, imbalances – are the primary sources of creativity.**

*Margaret J. Wheatley*

## CONFLICTS WITHIN THE CRCG

Perhaps conflict is the thing most dreaded by leaders. However, conflict, properly managed, can be a great source of creativity, innovation, and team building. One way to avoid unnecessary splintering of the CRCG is to operate by consensus. Voting tends to divide groups into “camps,” whereas with consensus, all have to come to agreement.

If a conflict does emerge, it is important to get it aired and to discuss the issues. Working through to resolution can result in creative approaches that had not been considered. If the issue is especially hot, or if you are seen as aligned with one side or the other, it may be useful to bring in a neutral facilitator to facilitate the discussion.

### *Conflicts between members*

Conflicts may from time to time emerge between members that involve their agency’s programs or policies. It is useful to have conflict mediators who are not members of the CRCG identified from the member agencies. If the issue is irresolvable by the members, or if it threatens the stability and effectiveness of the CRCG, the issue can be turned over to the mediators to resolve and report back to the CRCG.

## RECRUITING PARTICIPANTS

The CRCG includes representatives from the state agencies, private providers, consumers and caregivers, family members, and representatives from local government agencies.

If any of these areas are not adequately represented, new members will need to be recruited. Agency representatives from the state agencies fall into two categories – agency representatives and affiliate representatives. Agency members are staff of the agency working at the regional or local level. Staff from the local Texas Department of Assistive and Rehabilitative Services office, such as a Rehabilitation Counselor for example, will serve on the CRCG, whereas, staff of the contracted local alcohol and substance abuse counseling center will serve rather than a Texas Department of State Health Services staff member.



## ***CRCG NEW CHAIR GUIDE***

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Some of your CRCG members should know persons from the state agencies or private sector organizations not currently represented on the CRCG. Have them contact these persons and determine who is the best person to participate on the CRCG, or to appoint a representative to the CRCG. Follow up with that individual. Provide a thorough understanding of the CRCG, the benefits of involvement by the agency, and the requirements of the memorandum of understanding. Invite that individual to the next CRCG meeting.

For private sector and local agency representatives, conduct a brainstorm with your CRCG to identify potential members. You can:

- assign members to call or meet with each prospect;
- invite them to an orientation meeting;
- ask prospective members to make a presentation about their programs at CRCG meetings;  
or
- give a CRCG presentation at a local interagency meeting.

For consumer, caregiver, family and parent representatives, you might ask each member to suggest one or two potential members and to provide a brief biography of each. A nominating committee can be appointed to review the prospects, meet with them, and make recommendations to the entire CRCG.

In selecting private, local government, consumer/caregiver, and parent/family representatives, maintain the diversity of the CRCG, not only demographically, but in terms of the types of populations they may represent. A clarifying question you may want to ask is, "Is our CRCG culturally representative of the county(ies) we serve?"

### **MEMBERS WITH INSUFFICIENT AUTHORITY**

If the member is unable to commit agency resources, the inappropriate person is at the table. Discuss the issue with the member and get his/her suggestions for solving the problem. It may mean educating the member's supervisor so that more authority can be granted, or it may mean finding a different person from that agency or organization.

Mention frequently at CRCG meetings the importance of members having the authority to commit resources of their agency or organization to the service plans developed for individuals. Remind members of the likelihood that customers will have been put off numerous times when seeking services, and that the CRCG is committed to having a service plan in place by the end of the meeting. Those members without sufficient authority may realize that either they need to get additional authority or that another representative from their agency or organization may be more appropriate.

Meet with the members who frequently say that they will need to check with someone else before committing to provide a service.

### **POOR PARTICIPATION**

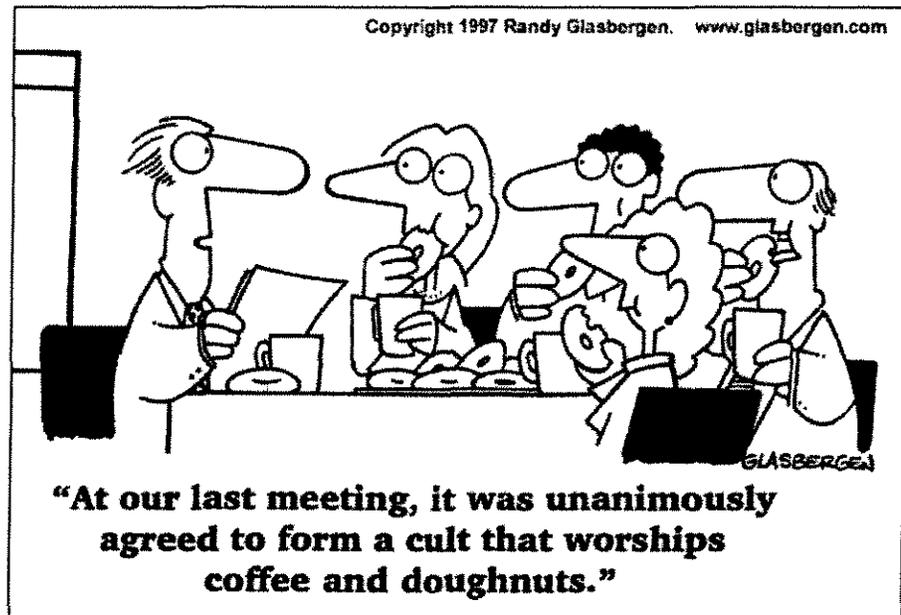
Your CRCG will be seriously impaired without full participation from the members. Full participation means attending meetings, providing services to customers, making referrals, serving as lead agency when appropriate, and assisting with the tasks of operating the CRCG.

**Low attendance**

There are many reasons people do not attend meetings. Underlying most of these is that the perceived benefit of participating is too small, relative to the cost (in time primarily) of participating. Your CRCG members have many demands on their time and must decide what to engage in and what to forgo.

Getting better attendance may be as simple as providing meeting reminders, both written and verbal. Reminding people of commitments not only overcomes forgetfulness, it raises the level of importance of the meeting in the member's mind. A postcard or e-mail notice will trigger the memory and a follow-up phone call will require the member to state whether or not they will attend. The member is more likely to say "yes" if asked personally to attend.

Poor attendance by one or two individuals may be changed by a call from the Chair. A call to inquire about possible schedule conflicts or other obstacles to participation may yield valuable information. The call, if nothing else, will let them know they are missed and that their participation is valued.



It may be that the member needs assistance in educating his/her supervisor about the CRCG and its value to their agency. You can make sure that the member has relevant literature about your CRCG and what it has accomplished. You might help the member develop some "talking points" to use in discussing the CRCG with his/her supervisor, including the benefits to their organization's client population.

If your efforts to involve representatives from the state agencies that are signatories of the CRCG or CRCGA Memorandum of Understanding are unsuccessful, you can call the Office of Program Coordination for Children and Youth and staff will gain assistance from necessary state agencies.

Be sure your CRCG meetings are worth attending. Be sure you have at least one customer for whom to develop an individual service plan at each meeting. Be sure the customers referred to the CRCG are diverse in terms of their situations and their service needs.

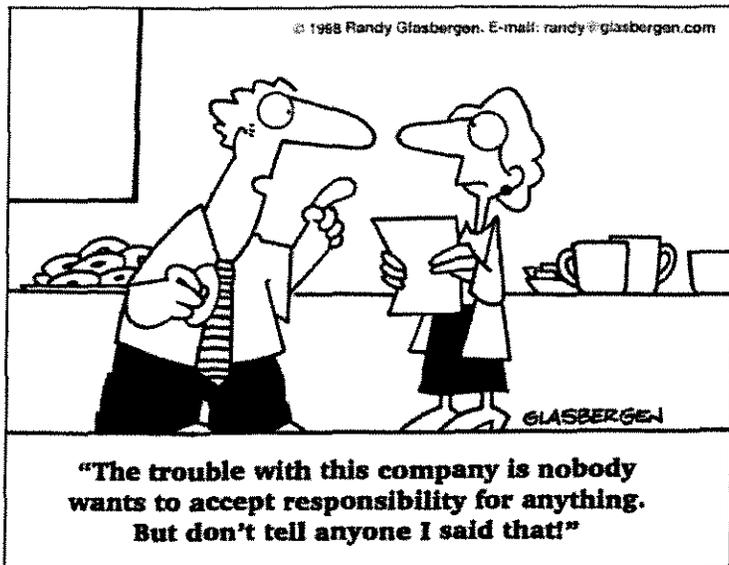
Consider having a spot on the agenda for guest speakers who can present material of interest to your members and to further your CRCGs capacity to effectively collaborate on service provision.

Consider involving food in the meeting, as it is always a great draw. One CRCG meets over lunch; the members preorder box lunches, which they pay for at the meeting. Another CRCG has coffee and donuts available prior to the meeting.

## *CRCG NEW CHAIR GUIDE*

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If poor attendance becomes a problem, call a special meeting of the CRCG to discuss the issue and develop solutions. Consider getting a meeting facilitator who would serve as a “neutral navigator” for your members.



### *Too few referrals*

If your members are not generating customer referrals to the CRCG, your CRCG cannot fulfill its mission. Your CRCG should strive to serve at least two customers a month so that, if one falls through, at least one individual service plan will be developed at each meeting. One CRCG routinely prepares individual service plans for five to seven customers at each monthly meeting.

Rotate responsibility for generating referrals among your members. Each member may agree to refer a customer on a given month.

It may be that the screening criteria are perceived as too restrictive by your members. They may feel that their referrals will get “kicked back” because their customer won’t meet the screen. Relax the screening criteria. This decision should be made by the entire CRCG and may result in more realistic criteria.

You may need to expand the referral base. Your CRCG can establish referral mechanisms for people not currently served by a CRCG member. One CRCG lets non-members refer through a member; other CRCGs permit anyone in the community to call the Chair with a referral.

If low referral rates continue to be a concern, call a special meeting of the CRCG to discuss the problem and develop solutions.

### *Lack of service commitments*

The power of the CRCG rests with the willingness of the members to commit resources to assist the customers referred to the CRCG. If the specific service commitments are not forthcoming, the CRCG has little to recommend it to the customer.

Be sure your members have the authority needed to commit their agency’s resources.

You may try calling upon specific members and asking if they provide a needed service and, if so, what it would take to get that service from their agency.

You may talk to members whose services may be needed prior to an ISP meeting after having reviewed the referral documents. The member can then come to the meeting prepared to commit the service(s).

Talk one-on-one to members reluctant to commit resources to determine the reason.

### **POOR FOLLOW THROUGH ON SERVICE PLANS**

The development and implementation of comprehensive individual service plans is what CRCGs are about. If follow through is not taking place, the ISP is worth very little.

The first thing to do is to find out what is happening:

Is this an occasional thing or is it a pattern for your CRCG?

Is the lead entity dropping the ball?

Have the agencies who have made commitments, put this ISP on a “back burner?”

Has the customer “abandoned” the plan?

If this is a pattern for the CRCG, the problem should be addressed by the entire CRCG. The issue should be laid out at a CRCG meeting and members invited to discuss the barriers to implementing the ISPs that are developed. A critical role of the Chair in these discussions is to prevent the discussion from including personal attacks. “Fix the problem, not the blame.”

If this is an occasional thing, address it case by case. Talk with the people involved. Help them find ways to remove the barriers.

### **CHAIR / COORDINATOR ROLES**

As CRCGs grow and mature — especially as the volume of CRCG referrals increases — many may benefit from having a CRCG Coordinator, a dedicated staff position. As this develops, it will be important to keep the respective roles of the Chair and Coordinator clear. While this may vary from CRCG to CRCG, and within a given CRCG over time, the Coordinator is not a member of the CRCG but serves as staff to it. The Coordinator will assume many of the tasks that may have been assumed by the Chair or others from the leadership team. These may include:

- Screening prospective customers;
- Preparing for meetings including notifying members and preparing materials;
- Assisting in developing the meeting agenda;
- Drafting minutes;
- Making public awareness presentations; and
- Preparing data reports for the State Office.

The Coordinator will support the lead entity by assisting with implementation and follow-up on the ISPs.

The Chair remains the chief elected officer of the CRCG and will provide guidance and supervision to the Coordinator on behalf of the CRCG. The members of the CRCG will be responsive to the critical needs identified by the Coordinator. The Chair and Coordinator should collaborate closely as policy and staff leaders of the CRCG.

**Don't fix the blame, fix the problem.**

*Japanese Proverb*



## CONCLUSION

**In a gentle way, you can shake the world.**

*Mahatma Ghandi*

You have embarked on a challenging and exciting journey! You have embraced an opportunity to make a difference in the lives of members of your community and of your community as a whole.

You are not alone on this journey. Your fellow CRCG members can provide you with insight, strength and support. Your fellow CRCG Chairs in other communities can offer their advice based on their experiences as Chair.

The Office of Program Coordination for Children and Youth exists to serve you and your CRCG. Please take advantage of the resources offered including:

- The CRCG website at [www.hhsc.state.tx.us/CRCG/CRCG.htm](http://www.hhsc.state.tx.us/CRCG/CRCG.htm);
- Tools and materials to support and enhance your CRCG; and
- Technical assistance.

For assistance contact:

**Office of Program Coordination for Children and Youth**

P.O. Box 13247

Mail Code: BH4100

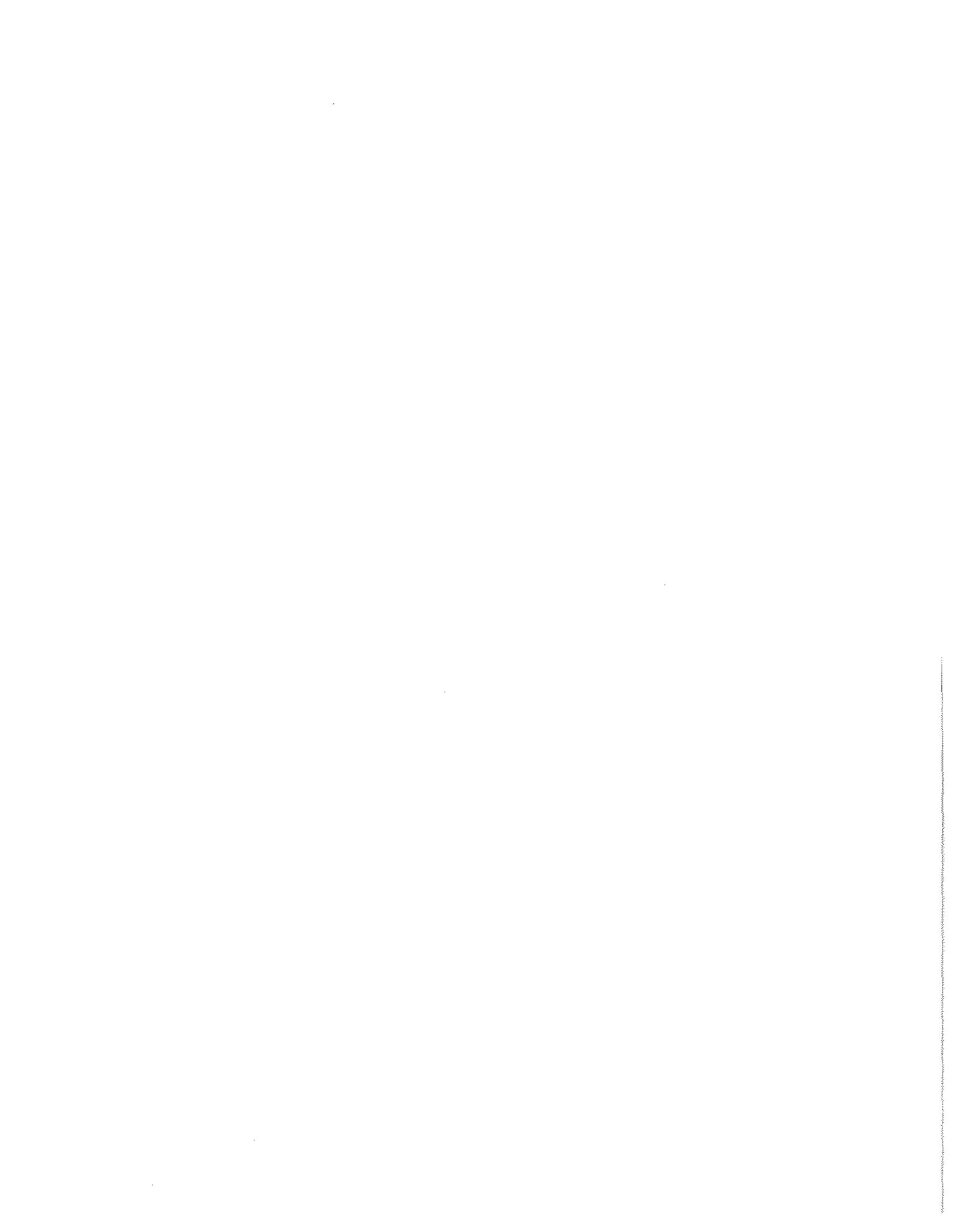
Austin, Texas 78711

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E-mail: [crcg@hhsc.state.tx.us](mailto:crcg@hhsc.state.tx.us)

Website: [www.hhsc.state.tx.us/crcg/crcg.htm](http://www.hhsc.state.tx.us/crcg/crcg.htm)



Community Resource Coordination Groups is a collaborative process serving the children and youth, families, and adults of Texas in partnership with:

Consumers and Caregivers

Families

Texas Health and Human Services Commission

Texas Department of Aging and Disability Services

Texas Department of Assistive and Rehabilitative Services

Texas Department of Family and Protective Services

Texas Department of State Health Services

Texas Correctional Office on Offenders with Medical or Mental Impairments

Texas Department of Criminal Justice

Texas Department of Housing and Community Affairs

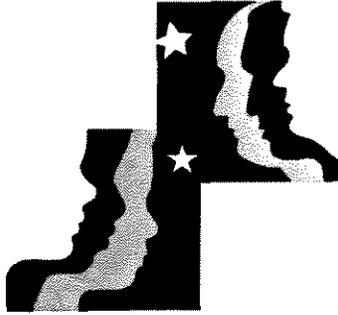
Private Providers

Texas Education Agency

Texas Juvenile Probation Commission

Texas Youth Commission

Texas Workforce Commission



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