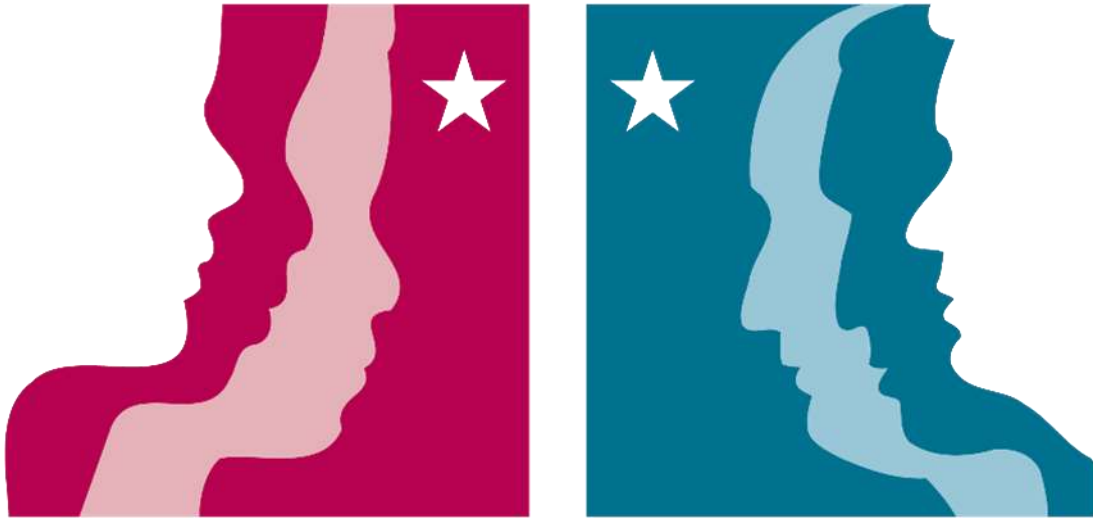# Community Resource Coordination Groups (CRCGs) of Texas Handbook

This handbook provides information for and about Community Resource Coordination Groups serving children and youth, adults, and families in Texas.

Updated December 2020

Original Version 2005

State CRCG Office

Texas Health and Human Services Commission

Office of Mental Health Coordination

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Table of Contents

Introduction

This guidebook provides information for Community Resource Coordination Groups (CRCGs) leaders and members to build and maintain their local CRCG. It outlines the basics of CRCGs, walks through starting the CRCG, reviews the roles of both leaders and members, goes over the CRCG process, and more. Tools and resources to supplement this guidebook may be found in the Training Toolkit on our website (https://crcg.hhs.texas.gov/).

The State CRCG Office

The State CRCG Office coordinates across programs, departments, and agencies to enhance policy development, stakeholder collaboration, and incorporation of best practices. The state office is in the Office of Mental Health Coordination (OMHC) at the Texas Health and Human Services Commission (HHSC).

The State CRCG Office manages the State CRCG Workgroup which includes a representative of each state agency participating in the CRCG program, representatives from Texans Care for Children and Texas Network of Youth Services, family representatives, and local CRCG leaders.

The State CRCG Office, in collaboration with the State CRCG Workgroup, supports local CRCGs by providing information, tools, guidance, training, and technical assistance (TA).

Visit our website for available resources including:
- Training and TA tools:
  - Training toolkit, a comprehensive resource that offers in-depth guidance for CRCG leaders and members. The toolkit is divided into easy to navigate modules and combines information from the CRCG handbook, webinars, and incorporates useful resources such as training videos and worksheets.
  - Webinar series to support and train local CRCG leaders, members, and partners. These webinars highlight state agency partners and provide training on key statewide initiatives. They also discuss programs that can help serve individuals and families referred to CRCGs. Each webinar focuses on a topic important to local CRCGs.
  - Monthly bridge calls for local CRCG leaders and members to receive peer-to-peer support, share ideas, discuss challenges, and network. Bridge calls are held the third Tuesday of the month from 2:00 - 3:00 p.m. CT/1:00 - 2:00 p.m. MT. Contact the State CRCG Office for the call information.
- Forms and templates, including a referral form and Individual Service Plan (ISP) template, that CRCGs can use as is or adapt to meet their CRCG's unique needs.

- Communications and marketing materials that local CRCGs can use to increase awareness of CRCGs, help recruit members, and learn about upcoming events and training opportunities.
- Data: The State CRCG Office gathers information about CRCG activities such as the number of people served, recommended resources, and agency participation from local CRCGs. This information is used to guide training and technical assistance, identify gaps and barriers, and inform the Texas Legislature and Governor of CRCG activities and community needs.

CRCG leaders may also reach out to the State CRCG Office for additional support and specific training and TA needs related to their local CRCG. Training and TA can take place virtually, by phone, or in person.

Contact us at:
- Phone: (512) 206-5255
- Email: CRCG@hhsc.state.tx.us

Overview of CRCGs

CRCGs are county-based groups of local partners and community members who work with parents, caregivers, children, youth, and adults with complex needs to identify and coordinate services and supports and develop ISPs, an agreement for coordination of services between the person or the family and the CRCG.

- They help people whose needs cannot be met by one single agency and who would benefit from interagency coordination.
- They strive to meet the individual's and family's needs with community-based solutions whenever possible.

Who do CRCGs serve and where are they located?

CRCGs are located across Texas and can be found in most counties. CRCGs serve different age groups based on the needs of their community and may serve mostly children and youth, or adults, or use a combined model that serves both populations. The majority of CRCGs serve all ages.

Young adults between 18 and 22 years old may be helped either through a CRCG serving children and youth or a CRCG serving adults, if both children and adult providers from public and private agencies work together to develop an ISP that meets the identified needs.

How do CRCGs improve lives?

CRCGs benefit Texans when they effectively collaborate to offer interagency coordination of services and supports for people with complex needs that cannot be met by a single agency, including behavioral health, basic needs, and caregiver support.

This approach allows more people to remain in their own homes and communities by addressing their needs proactively and reducing any duplication of effort. Through the coordinated support of a CRCG, more Texans can live with improved health and wellness.

The public and private partnerships of CRCGs benefit the local community by identifying service gaps and barriers and by working to find non-traditional solutions. CRCGs help stretch existing resources and are often successful in identifying new resources and funding to address gaps and barriers.

What do CRCGs do?

CRCGs meet to:
- Host staffings for children, youth, adults, families, and caregivers to coordinate services and supports.

- Build relationships among local organizations and educate each other on the programs and services available in the community.
- Identify gaps in services and barriers to accessing services and share that information with local and state-level partners and systems to find solutions to meet the needs of their community.

What is a staffing?

A staffing's main function is to connect people with services. During a staffing, CRCGs partner with individuals and families who need interagency coordination to:
- Discuss their strengths, unique needs, previous services, and barriers.
- Brainstorm ideas for appropriate services and supports.
- Create ISPs and help locate and access services and supports.

People are referred to CRCGs for staffings through the following ways:
- A local agency or organization,
- Family or peer representatives, or
- Through their own request.

Referrals that require immediate attention will need to have an emergency staffing scheduled to address needs that cannot wait.

After the initial staffing, the CRCG should check in with the individual or family about how the recommendations on their ISP are working. If adjustments need to be made, the CRCG may arrange a follow-up staffing.

Who is a part of CRCGs?

CRCGs are organized by the local community. CRCG members include local professional partners and community members who know about services in their community. Many CRCGs also include people who have been through the process before, such as individuals, parents, or caregivers. All CRCGs should include mandated state agency partners and local partners.

Overview of CRCG Model and Guiding Principles

CRCGs are locally designed, developed, and managed. To ensure basic standards and consistency, state and local stakeholders developed the following Model and Guiding Principles:
- Each CRCG should include:
  - State agencies who have signed the Memorandum of Understanding (MOU) or their local affiliates.
  - Representatives of private agencies.
  - A family or peer representative – a person who has experiences with physical, emotional, behavioral or mental health challenges and knowledge of the CRCG process — who is available to explain the process,

answer questions and support the family before, during, and after the meeting.

- All CRCG members should have the authority to commit services or resources for individuals and families referred to the CRCG.
- The CRCG will create an ISP based on the individual's or family's strengths. The plan will help the person or family get the services they need. It is developed with the person or family and the agency representatives.
- Services should be provided in the most homelike, nurturing environment and the least restrictive setting possible. Whenever possible, the service plan will recommend services within the community. When services outside the community are necessary, they will be in the least restrictive environment possible.
- When placement outside the community is necessary, the service plan will include a plan for bringing the person back into the community and, as appropriate, into the family.
- The involvement of the individual or family is essential to the success of the development and implementation of the ISP.
- People referred to CRCGs are those who face barriers or obstacles to having all their needs met through existing resources and whose needs can be met only through agencies working together. The referring agency will explore services and resources within and outside the agency before sending someone to a CRCG.
- Agencies must be as flexible as possible when committing services and resources for people referred to the CRCG, within existing eligibility criteria and funding policy.
- The CRCG will assign an agency (usually the agency who is providing most of the services on the plan) to help oversee the service plan and follow up with the person or family.
- Each CRCG member is responsible for ensuring confidentiality for people and families referred to a CRCG. Members who represent an agency or organization should follow their agency's/organization's policies for confidentiality.
- CRCGs acknowledge and adapt to the cultural and linguistic differences and needs of the individuals and families they serve, which helps to make services and supports more accessible while providing understandable, equitable, respectful, and effective quality of care.

History

CRCGs originated with Texas 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 multi-agency needs. In the late 1990s, interest emerged to adapt the CRCG model to serve adults with complex multi-agency needs. For more than 20 years, CRCGs have remained dedicated to serving individuals and families in their communities.

Key History and Legislation Related to CRCGs[1]

1987   The Texas Legislature enacted Senate Bill (S.B.) 298, 70th Legislature, Regular Session, 1987, requiring eight public agencies to work together to assist children and youth with complex needs whose needs could not be met by a single agency.

1988   The CRCG model established interagency service planning at the local county level. This model was piloted in Henderson, Tarrant, Travis, and Val Verde counties in 1988 and 1989.

1990   The State CRCG Office was established to develop the CRCG process and oversee implementation of the MOU.

1993   The State CRCG Office was established as a permanent office under HHSC to provide ongoing technical assistance and training for CRCGs.

1996   Total statewide coverage for CRCGs serving children and youth was accomplished. A local CRCG to serve children and youth was available to all 254 counties in Texas.

2001   The Texas Legislature enacted S.B. 1468, 77th Legislature, Regular Session, 2001, codified in Texas Government Code §531.055, requiring the development of an MOU for CRCGs that serve adults.

2014   Health and Human Services hired a CRCG Statewide Coordinator who guided the office in providing statewide support in the areas of communication, training and TA, and data and research.

2017   The 85th Texas Legislature updated Texas Government Code §531.055 to include the Texas Education Agency as a member agency in the joint memorandum of understanding. Further, it expanded the responsibilities of the State CRCG Workgroup.

The Texas Legislature enacted House Bill (H.B.) 1204, 85th Legislature, Regular Session, 2017, establishing a mechanism to allow the Texas Juvenile Justice Department (TJJD) to refer children under 12 years old to CRCGs for service coordination as an alternative to adjudication.

The Texas Legislature enacted H.B. 928, 85th Legislature, Regular Session, 2017, requiring Department of Family and Protective Services staff to inform local CRCGs about tuition and fee waiver programs that are available to children and youth who have experience in the foster care system or with adoption.

The State CRCG Office was transferred to the OMHC within HHSC because the mission of CRCGs align with OMHC's.

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[1] A detailed legislative history pertaining to CRCGs is available at https://crcg.hhs.texas.gov.

2019   The 86th Texas Legislature updated Government Codes § 531.421 and §431.422 by repealing the word "consortium" and replacing it with "commission" meaning HHSC.

The State CRCG Office launched a new data collection system.

CRCG Responsibilities

There are multiple layers of requirements related to CRCG operations. CRCGs are embedded in the policies and procedures of various programs and resources across the state. This section outlines the roles and responsibilities of CRCGs within the CRCG MOU, programs, and resources.

Memorandum of Understanding (MOU)

As directed by S.B. 1468, 77th Legislature, Regular Session, 2001, and updated in H.B. 2904, 85th Legislature, Regular Session, 2017, a joint MOU was developed to create a statewide system of CRCGs for all ages (children, youth, adults, and families). The state-level MOU formalizes the commitment of participating state agencies and outlines the responsibilities of local CRCGs, the State CRCG Office and Workgroup, and participating agencies. Local CRCGs may utilize the state-level MOU as a model to develop a local agreement and include state agency local affiliates and private entities.

The MOU contains information about the CRCG Program including:
- Overview
- Purpose
- Mission
- Guiding model(s)
- Consumer choice and the role of families, consumers, and caregivers
- Agency responsibilities
- Functions of local CRCGs
- Membership and organization of local CRCGs
- Eliminating duplication of services
- Responsibilities of HHSC and member agencies
- Interagency dispute resolution
- Terms of agreement

Mandated Members

The CRCG MOU is a signed agreement between the following state agencies:
- HHSC
- Texas Department of Family and Protective Services (DFPS)
- Texas Department of State Health Services (DSHS)
- Texas Department of Criminal Justice (TDCJ) - Texas Correctional Office on Offenders with Medical or Mental Impairments (TCOOMMI)
- TJJD
- Texas Education Agency (TEA)
- Texas Department of Housing and Community Affairs (TDHCA)
- Texas Workforce Commission (TWC)

Agency members can provide local agency representation and participation by local or regional agency office, regional education service centers, local authorities, providers, or local contractors.[2] Local representatives of each agency must have the authority to contribute to decisions and recommendations made by the local CRCG.

In addition to the mandated agencies, the MOU also requires the participation of:
- People served and family representatives – a person who has experiences with physical, emotional, behavioral or mental health challenges and knowledge of the CRCG process.
- Representatives of local private sector organizations.

All members share equal status regarding making recommendations.

Responsibilities for CRCGs and Member Agencies

The CRCG MOU outlines the responsibilities of local CRCGs, member agencies and the State CRCG Office. Local CRCGs and member agencies:
- Refer children, youth, adults, and families to CRCGs when they have exhausted agency resources and require multi-agency service coordination.
- Serve people of all ages whenever possible within the scope of the resources available in the community.
- Develop coordinated ISPs in partnership with people with complex needs in the language of their choice.
- Promote a community-based approach to facilitate coordination of services for people needing multiagency services in the least restrictive setting appropriate.
- Make efforts to eliminate duplication of services relating to the assessment and diagnosis, treatment, residential placement and care, and case management of persons needing multiagency services.
- Contribute to making recommendations and committing resources toward resolving problems of people needing multiagency services.
- Incorporate natural supports in the development of ISPs when possible.
- Identify gaps in service delivery systems or barriers to accessing services and establish relationships among local service providers for collaboration outside of the local CRCG setting.
- Inform local system of care governance bodies on behavioral health trends, strengths, gaps, barriers, and solutions. CRCG chair will participate in meetings of local system of care governance body, if one exists.
- Implement the system of care philosophy and approach with support from the State CRCG Office.
- Collect, share, and submit CRCG data to HHSC through the CRCG data collection system.
- Agree to assist the efforts of local CRCGs in developing local funding mechanisms, identifying and providing state-level funding, and in seeking

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[2] Texas Government Code §531.055(b)(6)

additional resources within the agencies to address service gaps as funding is available.

- When considering an out-of-home placement as the option of last resort and as the least restrictive setting appropriate for a child/youth, the group will engage in a permanency planning process that focuses on family support by facilitating a permanent living arrangement with the goal of reunification when appropriate, and with the primary feature being an enduring and nurturing family relationship.[3,4] Similarly, when an out-of-home placement is considered as the option of last resort and as the least restrictive setting appropriate for an adult, the group will also engage in a planning process that facilitates an ongoing living arrangement that meets the adult's needs, goals, and independence.
- Each agency representative is encouraged to attend all meetings to contribute to the collective knowledge and ability of the CRCG to resolve a person's need for multiagency services.
- Develop bylaws to include the following items at minimum: group leadership and roles, meeting schedule, participation expectations, targeted age group, case identification criteria, and referral criteria.
- Create and implement confidentiality and consent procedures that permit sharing of information while protecting personal information in accordance with state and federal law. Each local CRCG member will obtain written consent from participating individuals to share confidential information. Additionally, each CRCG member will sign a CRCG confidentiality agreement.

Visit the CRCG website to view the full MOU.

Texas Legislative and Government Code Requirements

This section provides a brief outline of the roles and responsibilities of CRCGs within the legislative and government codes. Visit the CRCG website for more information on Texas Legislative and Government Code requirements for CRCGs.

Non-Educational (Non-Ed) Funds

The 74th Legislature appropriated funds to school districts to provide non-ed community-based support services for certain students with disabilities and their families who are at risk for being placed in residential facilities for educational reasons or who are currently in a residential placement for educational purposes to return home.[5] Non-ed funds help families care for their children and enable them to

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[3] Texas Government Code, §531.151
[4] Texas Government Code, §531.154
[5] 2 Texas Education Code, §29.013

better cope with having an individual with a disability at home.[6] These services are not intended to be intensive or long-term but rather, periodic and short-term.[7]

- CRCGs assist in the planning process for non-ed funds by reviewing and signing the application that is submitted by the Independent School District, also known as the Local Education Authority. The school district applies for non-ed funds on behalf of the student; therefore, it is the district's responsibility to submit the application. The application is submitted to the regional education service center which then approves or denies the application.
  - o School districts and charter schools that apply for non-ed funds must have a planning meeting to discuss options for non-ed services. The CRCG may serve as the planning meeting.
  - o Once non-ed funds are awarded, the CRCG supports the family to identify service providers.[8]

Permanency Planning

The goal of permanency planning is to support children with developmental disabilities who either live in an institution or who are at imminent risk of admission to an institution that live in a family setting. Texas law requires permanency planning for each child living in an institution who has a developmental disability and is younger than 22 years.[9] Institutions include nursing facilities, Intermediate Care Facilities for Individuals with an Intellectual Disability or Related Conditions including state supported living centers, and settings with supervised living and residential support through the Home and Community-Based Services program. Institutions must notify the CRCG in the county in which the parent or guardian of the child resides within three days of the child's admission.

Permanency planning responsibilities are assigned to designated local intellectual and developmental disability authorities (LIDDAs) and EveryChild, Inc. When a CRCG is contacted by an institution, the CRCG may also contact the permanency planner and/or the child's parent or guardian to ensure they are aware of services and supports that could provide alternatives to the institution, available placement options, and opportunities for permanency planning.[10] The CRCG can help identify and coordinate services in the least restrictive setting for persons with complex needs.

Waco Center for Youth

Waco Center for Youth is a long-term psychiatric residential treatment facility that serves youth 13 through 17 years old with severe emotional or behavioral

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[6] Texas Education Agency (2007-2020). *Non-educational Community-Based Support Services.*
[7] Texas Education Agency (2009, August). *Noneducational Community-Based Support Services Frequently Asked Questions.*
[8] Texas Education Agency (2007-2020). *Non-educational Community-Based Support Services.*
[9] 40 Texas Administrative Code (TAC), §19.805
[10] 4 Texas Government Code, §531.155

disorders, who have experienced serious dysfunction, and who have exhausted available community treatment resources.[11]

Youth must be referred to the Waco Center for Youth to be considered for admission. Referrals are made through a local mental health authority (LMHA), local behavioral health authority (LBHA), or state mental health facility (SMHF).

- Referrals from the LMHA or LBHA should be reviewed by the local CRCG to determine if all appropriate community-based resources have been exhausted and Waco Center for Youth is the least restrictive environment needed.
- If all community-based resources have been exhausted, the CRCG may write a letter of recommendation to accompany the referral, stating that the CRCG met and endorses the referral. [12]
- An ISP should be created to support the youth and family with recommendations for services while they wait for admission.
- For youth who are currently receiving services at the Waco Center for Youth, a CRCG meeting should be utilized prior to discharge to ensure continuity of care and support for the youth and their family as they reintegrate into the community.

North Texas State Hospital

The Adolescent Forensic Program is a maximum-security residential program located on the North Texas State Hospital - Vernon South Campus serving youth throughout the state of Texas. The adolescents served range in age from 13 to 17 years old with a variety of mental health and substance use needs. Admission to the AFP of North Texas State Hospital is accomplished through referral by a family court, Local Mental Health Authority or Local Behavioral Health Authority[13].

CRCGs review requests or recommendations for placement in the North Texas State Hospital:[14]
- The CRCG is required for admission as a voluntary condition of probation and should evaluate if long-term residential treatment is appropriate. The CRCG should hold a staffing with community stakeholders, such as family, treatment providers, and probation officers, to review the recommendation and ensure all community resources have been utilized and exhausted.
- Once this has been confirmed, the CRCG may provide a letter of recommendation with the referral to assist with gaining admission to the North Texas State Hospital - Vernon South Campus.

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[11] Texas Health and Human Services (n.d.). Waco Center for Youth.
[12] 26 Texas Administrative Code (TAC), §306.174
[13] Texas Health and Human Services (n.d.). *State Hospitals.* Retrieved April, 8 2021, https://hhs.texas.gov/services/mental-health-substance-use/state-hospitals
[14] 26 Texas Administrative Code (TAC), §306.173

Prior to discharge, a CRCG meeting should be organized to assist the facility, youth, and family with creating a transition plan and support services to ensure continuity of care services for reintegration back to the community.

Juvenile Justice Diversion

H.B. 1204 changed the way juvenile referrals and detentions for those under 12 years old are handled. This bill requires the following:

- The person conducting the preliminary investigation refers the child's case to a CRCG or local juvenile service provider for a staffing if they determine the child is:
  - Younger than 12 years of age;
  - Believed to have engaged in delinquent conduct or conduct indicating a need for supervision;
  - Not required to be referred to a jurisdiction's prosecuting attorney;
  - Eligible for deferred prosecution; and
  - Their family is not currently receiving services and would benefit from services.[15]
- The CRCG or local community juvenile service provider will evaluate the child's case and make recommendations to the juvenile probation department for appropriate services for the child and child's family. [16]
- The probation department carries responsibility for initiating the staffing, creating a service plan that incorporates resulting recommendations, monitoring and adjusting the service plan for up to three months, and referring the juvenile back to the prosecuting attorney if the child fails to successfully participate in the required services during the period.[17]
- Each juvenile board establishes policies to divert juveniles younger than 12 from referral to the prosecuting attorney and to limit detention for juveniles younger than 12 years to circumstances of last resort.[18]

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[15] 3 Texas Family Code, §53.01
[16] 3 Texas Family Code, §53.011
[17] 3 Texas Family Code, §53.011
[18] 10 Texas Human Resources Code, §152.00145

Organize Your CRCG

Whether your CRCG is being developed or is already established, it is important to continually evaluate the CRCG's membership, goals, and policies and procedures. The following steps provide a chronological order of procedures to help ensure the creation, revival, or maintenance of an effective CRCG. During any of the steps of the process, contact the State CRCG Office at (512) 206-5255 or CRCG@hhsc.state.tx.us for questions or to request technical assistance.

Identify Partners and Representatives

Establishing a strong membership that represents the needs of your community is key to the success of your CRCG. Begin by assessing the common needs of the individuals and families your CRCG serves or plans to serve and identify key people, agencies, or organizations providing human services and supports in the community that meet those needs. Consider including representatives from mandated state agencies, local state agency affiliates, private non-profit organizations, faith-based organizations, the local school district, and individuals with lived experience and their family members.

It is recommended that CRCGs evaluate their membership on an annual basis to ensure that agencies and organizations who play an important role in the service and support system for individuals with complex needs are not missing from the CRCG's membership.

Mandated Members

Mandated members include:
- MOU agencies (HHSC, DFPS, DSHS, TDCJ - TCOOMMI, TJJD, TEA, TDHCA, TWC)
- People served and family representatives
- Private sector and community organizations that can contribute services to an ISP

Prospective Partners and Members

Membership of each CRCG will look different based on the needs of the population served and the agencies and organizations within a community. When determining partners and members to invite to an organizational meeting or to an existing CRCG consider:
- Who does the CRCG serve or plan to serve, and what are their needs?
- Which agencies and organizations should be at the table to ensure that the CRCG is culturally representative of the county(ies) served?
- Do we have people with lived experience who we can invite?

Common partners and members include:

State agencies or local affiliates:
- LMHA
- LIDAA
- Area agency on aging
- Aging and disability resource center
- DSHS regional and program office
- DFPS Prevention and Early Intervention program office
- Child Protective Services
- Adult Protective Services
- Texas Workforce Solutions office
- Education Service Center
- Juvenile probation office
- TDCJ-TCOOMMI regional office
- Adult parole and probation offices

Other local groups:
- Local government agencies
- Judges and judicial support offices
- Veterans services
- Local housing authority
- School districts
- Peer and family representatives
- Counseling and other health providers
- Managed care organizations
- Higher education institutions
- Council of Governments
- Community-serving organizations (United Way, 2-1-1, etc.)
- Faith-based organizations
- Private sector stakeholders (businesses, employers, etc.)

A sample CRCG meeting invitation letter can be found in Appendix H. For additional information about recruiting members, refer to the Tips for Recruiting CRCG Members page on the website.

Plan an Organizational Meeting

An organizational meeting can be useful for developing CRCGs, as well as existing ones. They help to bring people together to focus on shared goals and strengthen the purpose of the CRCG. For communities without a CRCG, the meeting can help determine whether one is needed and help get it started. For existing CRCGs, an organizational meeting can be used to re-evaluate membership and the community's needs, provide an orientation for new members, and set goals for the coming year. For the purpose of this guide, the following outline of an organizational meeting is focused on starting a CRCG.

When planning the organizational meeting, consider the following:
- Reach out to key leaders to determine a date, time, and an accessible meeting site in a centralized location.
- Develop an invitation. A sample invitation is available in Appendix E. Consider including outreach materials from the website created by the State CRCG Office.
- Create the meeting agenda. A sample agenda can be found in Appendix F. Include topics such as:
  - An overview of CRCGs
  - CRCG membership
  - Benefits of CRCGs and why one is needed in the community

o   Next steps to establish the CRCG

Host the Organizational Meeting

At the organizational meeting, explain the purpose of gathering everyone together. Describe what CRCGs are and how they work. The State CRCG Office developed a brochure and partner flyer (available on the website) that can help explain CRCGs.

Outline the benefits of CRCGs for individuals, families, communities, and how they can impact agencies' challenges. For example, explain to a probation chief how coordinating community-based resources for a child and family can decrease out-of-home placements. Expand on how CRCGs can help decrease the duplication of efforts, streamline services, and connect providers. Ask attendees that have participated in other CRCGs to share their experiences.

Have the group discuss the needs of your community and consider how a CRCG can help address those needs. If the group decides to create a CRCG, use some of the following questions to set guidelines and expectations. Additional planning meetings may need to be scheduled to discuss these items.

- What age groups will we serve? CRCGs serve different age groups based on the needs of their community. The majority of CRCGs serve all ages. Some things to consider when determining who your CRCG will serve:
  o   Which populations are most in need of coordinated support?
  o   Where are the gaps and barriers to services in our community?
  o   Is the population of the county changing dramatically? Consider economic shifts such as major employers either coming to or exiting an area, an influx of retired persons, etc.
- How many counties will we serve? If we serve multiple counties, will monthly meetings stay in one place or rotate?
  o   Do natural partnerships exist? Are most of the services located in one county or city that the connecting county is dependent upon.
  o   Do natural boundaries exist? Consider agency service regions, travel distances, concentrations of specific non-English speaking populations, etc.
- Where and when will we host our regular meetings? How often will we meet?
  o   Monthly meetings held at the same time have shown to increase attendance and participation.
- What organizations and community partners need to be part of the CRCG?
  o   Review the CRCG MOU and brief partner agencies on their responsibilities.
  o   Emphasize the importance of each agency's participation and how it will play an important role for the children, youth, adults, and families the CRCG serves.
  o   If the CRCG will primarily be serving children and youth, consider which community partners the CRCG should stay connected with to serve the entire family unit and provide services for the adults in the family.
- What CRCG leader roles will we have and how will we select members for those roles?

- How long will leadership roles be held?
  - What will our referral process and screening criteria look like?
  - How will the CRCG receive referrals?
  - How will individuals, families, and caregivers be engaged in discussions and decisions?

For more information on how to develop or revive a CRCG, review the New CRCG Checklist in Appendix D.

Determine the CRCG's Organizational Structure

Having a defined organizational structure can help ensure that the CRCG operates smoothly, even during unexpected situations such as a leader leaving. Designated policies and procedures may:
- Decrease burnout by evenly distributing essential CRCG tasks among leaders and members.
- Increase membership and attendance by clearly outlining member responsibilities and expectations.
- Assist with more organized meetings.
- Allow the CRCG to concentrate on being more person-centered and family-focused.

Creating the CRCG's organizational structure as a group may help increase member buy-in and participation. CRCGs can revisit any elements of their structure at any time and adjust them to meet the CRCG's current needs.

Mission

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

A mission statement is created by answering the following questions:
- What does the CRCG do?
- Who does the CRCG serve and what do they get out of it?
- What do we want the CRCG to accomplish?
- How does the CRCG help the individuals and families it serves?
- What do we want to get out of the CRCG for ourselves?
- What values, standards, or goals drive the work of this CRCG?

Once developed, the mission statement should be periodically reviewed by the CRCG. Over time, experience and new member input may result in needing to revise the mission of the CRCG.

Bylaws

Bylaws are policies and procedures developed by the CRCG to establish basic organizational components of the group. They may be simple or comprehensive as determined by the CRCG. A bylaw example is available in Appendix G.

Basic elements in bylaws:
- Name
- Location
- Meeting information
  - Meeting frequency and duration
  - Identified facilitator
  - Identified minute and data recorder and reporter
  - Decision making method (examples: consensus, modified consensus, majority vote)
- Membership information
  - Attendance expectations and requirements
  - Filling vacancies
  - Addition of new members
- Organizational structure
  - Leadership team
  - Titles (examples: chair, co-chair, secretary)
  - Responsibilities (examples: review referrals, facilitate staffings, record minutes)
  - Length of leadership terms
  - Selection process
- Referral process
- Emergency staffing protocol
- Orientation of new members
- Review and modification of bylaws

Ground Rules

Ground rules are simple, basic rules by which the group has agreed to operate. These rules reflect statements about individual behaviors that are encouraged to make the meeting effective for all participants. Consider reminding the group of the ground rules prior to the start of each meeting.

Examples of Ground Rules:
- Meetings will start and end on time.
- Avoid personal attacks and the use of labels.
- Listen with understanding to what others have to say.
- Avoid sidebar conversations.
- Encourage everyone to participate.
- Monitor your own "air-time."
- Be concise.
- Don't interrupt.

- Stay on 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 acronyms.

Leader Roles and Responsibilities

Leadership is a key element in keeping the CRCG alive in a local community. Each CRCG is unique and the leadership structure of each may be determined by several factors. It is recommended that leadership be shared by a team, dividing responsibilities among several individuals, limiting the burden on any one person. Leadership teams may include a Chair, Co-Chair, a Recorder or Secretary, Data Reporter, and a Coordinator. Each CRCG determines its leadership structure and the process for choosing leaders and documents it in the bylaws. Many CRCG members volunteer to take on a leadership role within their group.

After you have selected your leadership team, notify the State CRCG Office of their contact information to update the contact database and website information. If available, email a list of all your members for the State CRCG Office to keep on file. Send this information to CRCG@hhsc.state.tx.us.

Leader Roles

The responsibilities outlined under each of the following leader roles are common examples and may change based on the CRCG structure, needs, or strength of each leader. Use the Task and Delegation Worksheet (available on the [website](#)) to help identify which roles need to be filled in the CRCG.

Chair

- Overall responsibility managing the CRCG.
- Facilitates CRCG meetings.
- Spokesperson for public awareness.
- Serves as a referral point of contact.
- Liaison to the State CRCG Office.
- Maintains accurate contact information in the CRCG directory hosted on the CRCG website.

Co-chair

- 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.
  - These roles may include screening referrals, public speaking on behalf of the CRCG, recruiting members, placing reminder calls to members, meeting scheduling and invitations, etc.
- Records meeting minutes (if there is no Recorder or Secretary).

Recorder or Secretary

- Keeps record of the meeting minutes.

- Maintains an accurate up-to-date membership roster and confidentiality agreements.
- Records recommendations on the ISP form.
- Reports monthly aggregate data in the online statewide data collection system regarding people served, barriers to service, and community gaps.
- Distributes meeting notices.
- Sends timely reminders to lead entities responsible for follow up reports at upcoming meetings.

Data Reporter

The data reporter does not need to be a separate role, but some CRCGs have a person assigned solely for data reporting tasks including:
- Tracks monthly staffing data.
- Reports monthly aggregate data in the online statewide data collection system.

Coordinator

As CRCGs grow and evolve and the volume of CRCG referrals increases, many CRCGs benefit from having a coordinator. A coordinator is a dedicated staff position to assist the CRCG. The coordinator serves as staff to the CRCG, rather than as a member. The coordinator may assume many of the tasks completed by the chair or others in the leadership team, including:
- Screens referrals.
- Meeting preparation, including notifying members, preparing materials, and briefing the individual or family prior to their staffing.
- Assists in developing the meeting agenda.
- Drafts minutes.
- Public awareness presentations.
- Data collection and reports.
- Lead point of contact for follow up on an ISP when there is not a clear lead.
- Encourages completion of the satisfaction survey.

Leadership Selection Process

It is very important for the CRCG to have a specific selection process established to ensure the sustainability of the CRCG. Leaders may unexpectedly have to leave their positions and having a defined leadership selection process outlined in the bylaws may make it easier for the CRCG to stay in operation.

Each CRCG creates their own process for leadership selection.
- Some CRCGs ask for volunteers and others may ask their members to nominate individuals.
- CRCGs may schedule annual elections and elect their leader(s) at a specified monthly meeting each year.
- Others rotate the Chair among agency members every year.

- Some CRCGs treat the Co-Chair or Vice Chair as a Chair-Elect who assumes the role of the Chair the following year.
- Other CRCGs have the same Chairperson for as long as they choose. In this case, it is recommended that an annual election is held to affirm the continuing leadership support by the group.

Leadership roles, selection processes and length of terms should be determined by the CRCG group and outlined in bylaws.

The models that work best in finding and retaining leadership include:
- A leadership team structure, instead of a single CRCG leader.
- Clearly outlined leadership team responsibilities.
- Defined term lengths.
- A designated leadership selection process.

The CRCG Guiding Principles recommends that CRCG leaders and the terms for leaders be re-evaluated annually. This can increase member participation in the process and reaffirm continued leadership support by the group. It may also provide CRCGs the opportunity to identify members who may be interested in leadership in the future.

Things to Consider in Choosing Your Leadership Team

The selection of the leadership team is among the most important tasks a CRCG undertakes. Leadership is crucial to the success of the CRCG process. The leadership team commits time, skills, and energy coordinating both CRCG members and vital resources in a collaborative process to help people with complex needs.

Refer to the CRCG Task Delegation Worksheet to help the CRCG identify the qualities that would be helpful in leadership team members. Skills to support the CRCG may include:
- Compassion
- Leadership
- Group facilitation
- Group motivation
- Planning
- Note taking
- Data management
- Communication
- Outreach
- Partnerships

Delegating Tasks

Tasks do not necessarily need to be divided by roles as outlined above. If you have multiple leaders, tasks can be delegated based on each other's strengths. For example, a CRCG may have two co-chairs and the first one may be very comfortable with public speaking, so they lead and facilitate the meetings. The other co-chair may be experienced in managing coalitions, so they may oversee meeting and staffing logistics and ensure that members are informed of upcoming meetings. Regardless of the leadership structure the CRCG decides to implement, ensure that each of the tasks mentioned in the Leader Roles section is covered by someone and that everyone's responsibilities are clear.

For various reasons, some CRCGs may only have one chair and to help lighten the workload on the sole leader, your CRCG can create an informal team by sharing responsibilities with your members. Members can volunteer for tasks and assignments without holding formal leadership roles. CRCGs may use the CRCG Task Delegation Worksheet to divide tasks, decrease the workload of leaders, and increase ownership and participation by members.

Member Roles and Responsibilities

CRCGs are organized by the local community on a county-by-county basis and are comprised of members who are committed individuals and representatives of organizations who work to improve the quality of life for the citizens of their community. CRCG members are aware of the strengths, needs, and barriers of their community; are knowledgeable of the services and supports their organization offers; and can commit resources and offer strategies in the meeting. CRCG members include local professional partners, community members, and people who have been through the CRCG process, such as individuals, parents, or caregivers.

Attendance and Involvement

The heart of the CRCG lies in the active participation of its members. CRCG members commit their agency's services and resources and are the essential implementers of the ISP. Members make referrals, carry out the ISP, and are responsible for the organization and structure of the CRCG itself.

Attendance and participation are important and required elements for the CRCG process to be successful. Having been assigned to attend a local CRCG is a privilege and as a CRCG member, you are asked to become involved with the CRCG process. The meeting is the focal point where your role is realized.

The primary role of CRCGs is to coordinate ISPs in partnership with individuals and families with complex needs. All members are asked to:
- Pool resources and find solutions as they strive to reach a mutual and satisfactory plan.
- Have both the knowledge and the authority to commit the agency's services and resources at the CRCG meeting to secure appropriate services for individuals in crisis who cannot wait for a decision on whether a service or resource can be provided. The CRCG's effectiveness to coordinate and integrate services is compromised if members cannot commit services or resources integral to the ISP.
- Help coordinate efforts to implement the recommendations of the entire group.
- Make referrals as appropriate.

It is important for every CRCG member to recognize the value of the collaborative working relationship and be invested in the belief that the CRCG can accomplish more by working together than by each agency operating independently. Consistent attendance demonstrates commitment of the agency to the CRCG process and to providing integrated quality services to the members of the community.

Members can volunteer for tasks and assignments without holding formal leadership roles within the CRCG. As a member, you can let your Chairperson know

that you are willing to help and accept assignments on either an ongoing or as-needed basis. This may include screening a new client referral, setting up the meeting room, making a presentation to a community group, keeping the minutes for the meetings, arranging for lunch, or a host of other activities. Other members could assist the group by tracking and reporting any follow up work that needs to be accomplished. In addition, a CRCG may have a timekeeper who helps the group manage its time effectively and efficiently.

Confidentiality

CRCGs, their leaders, members, and guest attendees must comply with applicable state and federal confidentiality laws, as well as individual agency policies. CRCGs must obtain signed confidentiality agreements from all CRCG leaders, members, and guest attendees. Each CRCG leader, member, and guest attendee is required to:

- Ensure confidentiality for referred individuals and families. Local CRCGs recognize and protect each individual's and family's right to confidentiality. This right cannot be abridged except in those cases required by law, such as an individual's expressed intent to harm self or others, or a client's report of abuse.
- Know their agency's confidentiality procedures. Members are bound by agency rules and procedures when sharing or delivering specific client information at a CRCG meeting.
- Understand that all information shared in the CRCG meeting is confidential. A release of information should be obtained prior to sharing information with the CRCG. Protected information includes, but is not limited to:
    - Client Information, including Personal Identifying Information defined by Texas Business and Commerce Code Chapter 521;
    - Protected Health Information (PHI) in any form including without limitation, Electronic Protected Health Information or Unsecured Protected Health Information defined in the Health Insurance Portability and Accountability Act;
    - Sensitive Personal Information defined by Texas Business and Commerce Code Ch. 521;
    - Federal Tax Information defined in Internal Revenue Service Publication 1075;
    - Social Security Administration Data, defined as records, information, or data made by the Social Security Administration to HHS for its administration of federally funded benefit programs under the Social Security Act including, without limitation, Medicaid information;
    - Education Records as defined by Federal Educational Rights and Privacy Act;
    - All information designated as confidential under the constitution and laws of the State of Texas and of the United States, including the Texas Health & Safety Code and the Texas Public Information Act, Texas Government Code, Chapter 552.

- Only share information outside the CRCG when needed to secure services and resources for the person being assisted. A release of information must be obtained prior to sharing confidential information outside the CRCG.

The CRCG must develop meeting procedures to remind members that confidential information will be discussed and that members are responsible for maintaining confidentiality. CRCGs members with lived experience, such as family or caregiver representatives, should be provided an orientation and training on confidentiality procedures relating to the CRCG process.

Release of Information

CRCGs, their leaders, and members must comply with applicable state and federal laws, as well as individual agency policies. As a potential referral source, members must follow specific procedures for releasing information and must obtain consent from the individual, parent, or legal guardian (as appropriate) to release information to the CRCG.

Refer to the [Consent and Release of Information](#) section for more information.

Engaging and Educating Your Agency

Engaging and educating your own agency about the purpose and benefits of CRCGs is highly important. Every new member should make a point of communicating back to their agency or organization about the CRCG process. The better you and your agency are informed, the better equipped you will be to coordinate services and resources for people in your community. One way to educate the agency or organization you represent is to disperse the CRCG brochure and partner flyer among your colleagues. You may also consider presenting CRCG information at your agency staff meetings and direct participants to the CRCG [website](#) for more information.

Support your role as a member of the CRCG by keeping your supervisor invested in your CRCG activities. It is up to you to help your supervisor understand the value of the CRCG to you, your agency, and your agency's clients.

You can keep your supervisor informed and invested in the following ways:
- Invite your supervisor to attend your CRCG meetings from time to time.
- Write articles for your internal news organizations.
- Email your supervisor about commitments you have made to a service plan and how it fits with the agency's goals.
- Let your supervisor know when one of your agency's clients is referred to the CRCG and keep your supervisor apprised of the progress and outcome.
- Ask or assist your supervisor in making a presentation in the community.
- Volunteer to provide in-service training to agency staff on the CRCG and how to use it to achieve the agency's objectives.

The CRCG Process

Each CRCG is unique in how it operates but all CRCGs generally follow the same process. The following diagram outlines the steps of the CRCG process.

Referral ➡ Preparation ➡ Meeting ➡ Follow Up

This section will provide a brief overview of the CRCG process. The next sections of the handbook will dive into deeper details about each step.

The State CRCG Office developed a best practice series for the CRCG process with webinars and one-page tip sheets that can be accessed on the [website](#).

Step 1: Referrals

This usually includes filling out a referral form with the individual or family and may include providing additional documentation and information. Individuals and families will also need to sign a consent to participate in a CRCG staffing, as well as a written release form that gives permission to the CRCG or current provider to share their information with CRCG members.

Step 2: Prepare for the CRCG Meeting

After determining if a referral is appropriate, schedule the staffing, invite members, and arrange materials for the CRCG and the individual or family. A CRCG member should also contact the individual or family prior to the meeting to discuss the meeting process and how to prepare. Explain which documents or information would be helpful to bring to the meeting. Discuss general needs, questions, or concerns the individual or family may have about the staffing.

Many CRCGs regularly meet even when they do not have a scheduled staffing and utilize their meeting time to have their members or other organizations present on the services they offer in their community, discuss gaps and barriers to services and supports, and connect with one another. Adjust your meeting materials to reflect what the CRCG will be discussing in place of a staffing.

Step 3: Host the CRCG Meeting

During the staffing, as a group, CRCG members and the individual or family will identify their goals and incorporate their strengths to create an ISP to help them

access services and supports. The CRCG will work to ensure that these services and supports are appropriate and fit with the individual or family's values, cultural beliefs, family structure, or routine. CRCGs strive to meet the individual's needs with community-based solutions whenever possible. The plan will list each recommended service discussed during the staffing, including next steps and contact information for the services.

If the CRCG does not have a staffing scheduled, CRCGs can utilize the meeting time to build connections among local organizations, educate members on services and supports available, discuss gaps in services and finding solutions to meet the needs of the community.

Step 4: Follow Up

During the creation of the ISP, the individual, family, or involved entity are assigned next action steps and the CRCG should ensure that everyone involved follows through on their assigned tasks. The CRCG should designate a member, usually the lead entity, to continually check with the individual or family to determine if the recommendations are working and if adjustments need to be made at a follow up staffing. The involved entities should provide updates on their progress to the CRCG at designated intervals.

Referrals

Individuals and families are connected to a CRCG through a referral. The primary purpose of the CRCG is to develop ISPs for people with complex needs who experience barriers and require coordination among multiple agencies to address their needs.

Most referrals are addressed during regular staffings. However, some referrals require immediate attention. CRCGs may develop a plan to come together on an emergency basis to address needs that cannot wait.

Consent and Release of Information

CRCGs, their leaders, and members must comply with applicable state and federal laws, as well as individual agency policies. The referring entity and CRCG must have written consent from the individual, parent, or legal guardian (as appropriate) to share information with the CRCG and members and to participate in the CRCG meeting.

Written consent must be obtained from the individual, parent, or legal guardian (as appropriate) that includes an explanation of the CRCG process, confidentiality procedures and limits, and an agreement to participate in the CRCG process. For staffings via telehealth, the consent must also include an explanation of potential concerns of privacy risks when using a virtual platform.

A written release of information must be obtained from the individual, parent, or legal guardian (as appropriate) any time information will be shared with the CRCG or its members. The individual or family may choose not to disclose certain information to the CRCG and may also choose not to disclose information to certain members of the CRCG. An individual's or family's information will not be released to any other party without the individual's or family's written consent.

Many CRCGs utilize their agency's consent and release forms and adapt them to meet the CRCG's needs. 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.

Who Can Refer?

The referral may be submitted by a CRCG member, a local agency or community organization, and family or peer representatives. Individuals and families also have the option to self-refer. When appropriate, a youth may self-refer or be referred by an agency without parental or guardian participation.

If possible, have a direct phone number or email dedicated to the CRCG to ensure that the CRCG can be easily contacted. Check that the CRCG's contact information is up-to-date on the CRCG website.

The Referral Process

Each CRCG develops its own referral criteria and procedures. Most CRCGs require the referred individual or family have needs that cannot be met by one agency and that the referring entity have explored and exhausted all available known resources.

Referral procedures may include:
- Complete the referral form with the individual or family.
- Send the referral form to the CRCG chair or coordinator.
- Review the referral form to ensure applicability.

The State CRCG Office developed a referral form template designed to gather the basic information needed to refer an individual or family for a CRCG staffing. Local CRCGs may use the form as a template, expand certain sections of the referral, or create their own. The template is available in English and Spanish.

The State CRCG Office also created the Referral Eligibility Chart to assist with determining the appropriateness of referrals. Both resources can be found on the CRCG website. If the referral is not eligible for a CRCG staffing, refer the individual or family to the appropriate resources and services in the community.

Referral Best Practices

Include the Youth, Individual, and Family

- If available, have a CRCG member or the referring organization fill in the form with the individual or family to ensure that their voice is included and to emphasize the importance of their involvement throughout the whole process.
- Youth play a valuable role in completing the referral. Involving youth in the referral process gives them the opportunity to think about their strengths (including their skills and natural support systems), goals, needs, and what would be helpful to them.

Explain the Referral Form

- Provide a clear explanation of what the CRCG is and ensure that the individual or family understands that it is an opportunity for solutions to be offered.
- Share why you are asking for this information and how it will be used.
- Explain why each component of the form is important.
- Consider health literacy and explain any terms or acronyms.

Consider Accessibility

- Have the referral form available in languages other than English.
- Take the information provided in the referral into consideration when preparing for the meeting (i.e., if the person has any accessibility requirements, needs language assistance, does not have access to transportation, etc.).

Implement Trauma Informed Practices

- Assess the information on the referral and understand what is trauma-related and how that information might impact the person currently.
- If you need more information to complete sections of the referral, ask with intention and be sensitive and deliberate about how you use the information.

Factors Contributing to Steady Referrals

The number of referrals a CRCG receives is largely dependent on the needs of their community, however CRCGs note certain positive factors that contribute to steady referrals, including the following items.

Relationships and Trust

- Good working relationships among agencies and consistent follow-through with service plans.
- Positive outcomes through the CRCG process are self-reinforcing for participants and build trust among members, families, and the community.
- Regular communication with referring agencies.

Community and Public Awareness

- An understanding of the purpose and goals of the CRCG throughout the community and partner agencies.
- Information about the CRCG is shared with the public through community events such as health fairs.

Creativity and Flexibility

- Members demonstrate a willingness to be creative to identify, develop, and access resources.
- Flexibility with scheduling meeting times and locations. Efforts are made to ensure individual and family participation, including offering phone or virtual participation as needed.

Consistency

- Meetings occur on a regular basis and members are provided with meeting reminders, notifications, and minutes.

- Consistent attendance by a cohesive core group.

Prepare for the CRCG Meeting

What you prepare for the CRCG meeting will depend on the agenda items. If a staffing is scheduled, CRCGs should not only prepare for the meeting but also arrange time to prepare the individual or family for their upcoming staffing. If the CRCG does not have a staffing, the CRCG may still meet for a variety of reasons including to discuss CRCG business, build connections with local organizations, and learn about programs and services.

Determine Meeting Content

A CRCG's meeting content can vary from month to month. Most CRCG meetings typically include staffings, CRCG business, and educational presentations. Depending on the meeting duration, a CRCG may include all three in their agenda or only schedule other items as staffings permit. Many CRCGs meet regularly regardless of having a staffing scheduled and discuss CRCG business or schedule educational presentations.

Staffings

Staffings are hosted for the CRCG members to partner with the individual or family to create an ISP to connect them with services. Determine whether a case needs to be immediately seen in an emergency staffing or if it can wait until the regularly scheduled meeting time. Based on the number of referrals the CRCG received for a meeting, decide how many staffings can be seen within the allotted time.

CRCG Business

The secondary purpose of CRCGs is to promote interagency collaboration and remove service gaps and barriers within the community. CRCGs business can include discussing their community and finding solutions to identified gaps in services and barriers to access or developing resources to address commonly identified needs. CRCG business may also include orientation and training for new members and activities to build relationships among current CRCG members. CRCGs may also want to discuss funding, recruiting new members and raising public awareness of the CRCG, expanding the CRCG's service population to all ages, updates to bylaws, etc.

Educational Presentations

Some CRCGs include an educational presentation as part of their monthly meeting. Others include it only if the number of staffings scheduled permit the time. When possible, think about providing continuing education units or certificates of attendance to your members to help promote attendance. Suggestions for the educational presentation include:
- A presentation on a program offered by a member agency.

- A program presentation by a non-member agency.
- A guest sharing a new community initiative.

Schedule

Many CRCGs meet monthly at a set date and time throughout the year, regardless of whether a staffing is scheduled. This provides consistency and allows a space for members to collaborate. If a CRCG has a large service area or serves multiple counties, it may be beneficial to rotate meeting locations or offer the option to attend virtually to accommodate those that travel far.

When scheduling a staffing, try to be flexible in the structure of the staffing and host the meeting at a time and location that works with the youth, individual, or family. A staffing should only be held for the individual or family if they will be present in some format (in person, virtually, or on the phone). Schedule specific start times for each of the staffings as a courtesy to the individual, family, and to others attending that part of the meeting. Talk with the individual or family to:
- Ensure the location of the meeting is accessible, gender inclusive, and easy to locate.
- Confirm that the staffing date does not conflict with cultural or religious holidays.
- Explore any meeting barriers the family might have (i.e., accessibility, room set up, etc.).

Virtual Meetings

A CRCG may choose to schedule a virtual meeting for a variety of reasons. The CRCG may do so on a case-by-case basis to accommodate for barriers to attending an in-person meeting that the individual or family may have, or the CRCG may adopt a hybrid model, allowing for some members to virtually join the meeting. If the CRCG will conduct a virtual meeting, certain protocols must be followed:
- As with in-person meetings, consent must be obtained from the individual, legal guardian, or legally authorized representative prior to the meeting. Consent must be clearly documented and include that the individual or family was provided an explanation of the process and potential concerns with telehealth, such as privacy risks. It must be documented that the individual or family agreed to participate via telehealth.
- Use a non-public facing, Health Insurance Portability and Accountability Act (HIPAA) compliant video communication product. CRCGs should seek privacy protections for telehealth while using video communication products. These products should provide such services through technology vendors that are HIPAA compliant and will enter into HIPAA business associate agreements (BAAs) in connection with the provision of their video communication products. Visit the CRCG website for a list of HIPAA-compliant platforms.
- CRCGs must set up procedures to ensure the confidentiality of the forms, documents, and information shared with members. CRCGs should continue to implement reasonable HIPAA safeguards to limit incidental uses or disclosure

of PHI. Reasonable precautions include, but are not limited to, ensuring that only authorized members or guests are in the meeting, conducting the meeting in private settings, using lowered voices, and not using speakerphone.

Notify and Invite

Member participation is crucial to the success of the CRCG. Routinely notifying members of the next meeting can increase participation, even if the meeting is regularly scheduled each month.

Meeting notices can be provided by email or phone. For example, notify members in writing a week before, and follow up with a phone call a day or two before the meeting. Meeting notifications can be the responsibility of any member.

If the meeting will be held virtually, include the meeting information such as the join link, room password, and call-in number in the meeting notice. The CRCG may want to include a virtual meeting information sheet that includes tips like:
- Join the meeting early to sign in and test the audio and video.
- Stay muted unless speaking.
- A number to call or text in case any technical issues arise.

The Tips for Virtual CRCG Meetings resource with more helpful tips is available on the CRCG website.

The CRCG meetings are open, however, CRCG staffings are restricted to members of the CRCG and invited organizations who are relevant to the staffing and have signed the CRCG confidentiality agreement. Special attention should be given to encouraging the attendance of these members and invited organizations. This will ensure that the organizations invited match the strengths and needs of the referred individual or family. If a child or youth is referred and the parents, caregivers, or adults of the family are seeking services, invite adult serving providers to address the needs of the entire family and potential underlying issues.

Members should be strongly encouraged to inform the CRCG leaders if they must be absent from a meeting. Some CRCGs encourage member organizations to appoint "alternates" to attend the CRCG meetings when the regular member will be absent. If an alternate or non-member organization attends, they must sign a confidentiality agreement.

Prepare the Youth, Individual, or Family

It is important that CRCGs create a process and provide time to prepare the individual or family for their staffing. A designated CRCG leader or member should reach out to the youth, individual, or family prior to their staffing to answer any questions. When a child or youth is referred, the child's family, caregiver, or other legal representative are invited to the meeting. The family and CRCG leadership

may make the decision to also invite the child or youth depending on the age, maturity, and condition of the youth. When an adult is referred, the adult is invited to the meeting, as is a caregiver and/or legal representative (if applicable).

Provide the Information for Your CRCG Meeting handout (available on the CRCG [website](#)) to help outline what to expect at the staffing. Explain that the staffing is an opportunity to express concerns about what brought them to the CRCG, and not necessarily about telling their whole story. Help them think through what they are going to tell the CRCG and questions to ask. Discuss which documents might be helpful for the individual or family to bring, such as medical insurance, psychological and/or psychiatric evaluations, school documentation, and discharge report from placement.

Describe how the room will be set up and list the organizations that may be at the staffing and explain their role. Ask the youth, individual, or family if there is someone they want or do not want at their staffing.

If the meeting will be virtual, ensure that the individual or family will have access to the meeting platform. Provide an overview of the platform and review the communication features available. Explain how the meeting will run, noting differences from an in-person meeting. Additional tips for supporting the individual and family for virtual meetings can be found on the Tips for Virtual CRCG Meetings resource available on the CRCG [website](#).

Encourage the youth, individual, or family to invite people from their support network (i.e., family, friend, pastor, etc.) or plan to have a CRCG member present for support. Prepare a check-in strategy with the individual or family and discuss:
- Concerns about the staffing.
- Language or circumstances that might be re-traumatizing.
- Plan a method, like a signal, for the individual to let someone know they are overwhelmed or not feeling okay about the meeting as it progresses.
- Ask what would be helpful from an emotional and outcomes perspective.

Special considerations to keep in mind if the youth will attend:
- Determine the preparation needed for the CRCG members, like how members should approach talking to the youth and to be mindful of the language they use in the presence of youth.
- Help the youth think through what is most important to share with the CRCG based on the areas in which they would like help.
- Identify a supportive adult who will be at the meeting that the youth feels comfortable asking questions to.
- Consider accommodations if young children will be attending.

Prepare Meeting and Staffing Materials

Forms and Documents

Prepare and assemble all materials prior to the meeting. The CRCG will need to have the following forms and documents:
- ISP: CRCGs create ISPs in partnership with the people they serve, this form is used to record the CRCG's recommendations. A template of the ISP form is available on the CRCG website.
- Consent and release of information: the referring entity must have written consent from the individual, parent, or legal guardian (as appropriate) to participate in the CRCG process prior to the meeting. Additionally, a written release of information must be obtained to share information with the CRCG. Refer to the Consent and Release of Information section for more information.
- Member and guest confidentiality agreement: each member and guest member must have a signed confidentiality agreement on file prior to attending any staffings. The CRCG Confidentiality Agreement Form and Policy is available on the CRCG website.
- Data Tracking Worksheet: this document streamlines the data tracking and entry process. It is best to use one worksheet for all staffings throughout the month. If the CRCG does not have a designated data reporter, assign a member to tally the information during each meeting (this can be a one-time task or a continuous responsibility). At the end of the month, total the tallies for each section and input the numbers into the data collection system. The Data Tracking Worksheet is available on the CRCG website.

Ensure materials that will be provided during the staffing match the individual or family's preferred language.

Agenda

A well thought out, carefully constructed agenda will help ensure that the meeting runs smoothly and accomplishes its goals. An agenda helps to:
- Outline the purpose of the meeting.
- Keep the meeting on track.
- Give structure around the amount of time for each topic.
- Eliminate the risk of missing important topics or accidentally going off-topic.

It is recommended that the CRCG develop a standard agenda by consensus. The standard agenda will lay out the items to be addressed at each meeting and the order in which they will be addressed. A standard agenda also simplifies the process of preparing for meetings. Leadership may "fill in the blanks" for each meeting. Revisit the agenda occasionally to be sure it continues to meet the needs of the CRCG, its members, and the individuals and families that it serves.

All CRCG members should be afforded the opportunity to provide input into the development of the agenda. To ensure members have sufficient opportunity to provide input, use the following approaches:

- Ask for agenda items for the next meeting at the conclusion of the current meeting.
- Keep an open invitation to members to suggest agenda items until a specified date before the next meeting.
- Review the agenda at the beginning of each meeting and provide the opportunity to amend the agenda.

For virtual CRCG meetings, the agenda may need to be adjusted to accommodate for the virtual setting, save time, or streamline the meeting process to make it easier for the referred individuals, families, and members. It is recommended that CRCG leaders divide the virtual tasks among the team or assign tasks to members like keeping track of who signs in to the meeting, monitoring the chat, keeping time, etc.

Below is a sample agenda. The times are suggested and may or may not be included on the distributed version. It might be helpful for the Chair to estimate the time needed for each item to keep the meeting on task. Some CRCGs establish time limits for each agenda item and appoint a timekeeper for this purpose.

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Sample CRCG Meeting Agenda

Mission: To create service plans through interagency collaboration for individuals and families whose needs cannot be met by a single agency.

I.   Introductions and announcements (10 minutes)

II.   Agenda review

III.   CRCG business (30 minutes)
   A. Review previous meeting minutes
   B. Other items of discussion (operating procedures, funding, systems change, increasing public awareness of the CRCG, recruiting new members, etc.)

IV.   Educational presentation (30 minutes)

V.   Follow up reports (30 minutes)
   a. One Month
   b. Three Months
   c. Six Months

VI.   Staffings: creation of ISPs (30 minutes each)

VII. Meeting reflection (10 minutes)

VIII. Adjourn

</div>

Other Materials

Other materials that may be needed for the meeting and staffing include, but are not limited to:
- Minutes of the previous meeting
- Sign in sheets
- Individual or family information packets, including the referral form
  - As mentioned in the referral section, release of information and consent to participate must be signed prior to scheduling a staffing and sending out information to members.
  - A copy of the referral and any other documents that will be provided to the CRCG should also be given to the individual or family prior to the staffing.
- Name tags or name tents
- Easel pads

Host the CRCG Meeting

CRCG meetings are most commonly conducted to host staffings. At a staffing, the CRCG discusses with the individual or family their strengths and needs, ideas for appropriate services and supports, and creates an ISP.

The meetings are also used to:
- Conduct follow up on previous ISPs.
- Assess community needs and identify ways to address gaps, increase awareness of the CRCG, and better support the community.
- Strengthen the CRCG by addressing systemic challenges identified through the development of ISPs.
- Share and learn about resources.
- Address administrative tasks like welcoming new members or establishing or modifying bylaws.

The portions of the meeting that do not include sharing of confidential information are open to all CRCG members, however to be mindful of the individual and family's comfort, and to help establish a safe space for discussion, staffing attendance should be limited. Additionally, due to the confidential and sensitive information shared at a staffing, staffings are restricted to CRCG members and guest organizations that can offer relevant services that match the strengths and needs of the referred individual or family. It is suggested to have staffings at the end of the CRCG meetings so that attendance can be limited to only members who can contribute services specific to the individuals and families.

Manage the Meeting

One of the meeting facilitator's key roles is to ensure that the CRCG's meetings are effective and efficient. Effectively managed meetings will:
- Help maintain active attendance and participation of the members.
- Ensure that important items are brought to resolution.
- Ensure that all participants are clear about expectations.
- 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, the orderly discussion of issues, and firm consensus on resolution of issues. Providing structure to the meeting will help ensure that:
- A comprehensive, coordinated ISP is developed.
- The individual or family is engaged and respected in the process.
- Commitments are clear.
- Expectations are well understood.
- Follow up is conducted.

Set Ground Rules

Clear, agreed upon ground rules are an effective meeting management tool. Ground rules should be developed and agreed to by all CRCG members, written down, and be prominently posted at each meeting. If the meeting will be virtual, remind CRCG members of any additional rules or guidelines that were added for the virtual setting.

Refer to [Determine the CRCG's Organizational Structure](#) for examples of ground rules.

Keep Time

Keeping time is a critical component of CRCG meetings. The meeting facilitator can be respectful of everyone's time by ensuring that the meeting starts and ends as scheduled.

To start the meeting on time, follow some of these suggestions:
- Arrive 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. The meeting room should be set up with an open structure to feel inviting and to promote a collaborative setting. Place chairs in a circle or horseshoe arrangement to avoid isolating the individual or family.
- Establish a strong expectation that meetings will start on time. This can be accomplished by starting at the appointed time regardless of who is present.
- Ask members to call you before the meeting if they will be late.
- Have a 30-minute informal networking time prior to the meeting and encourage members to come early to meet each other. This can also be done for virtual meetings.
- If a member is consistently late, meet with them one-on-one to discuss your concerns and discover ways to assist the member to be timelier.
- If lateness to the meeting is a consistent problem with multiple members of the group, put it on the agenda for discussion and have members develop a plan to solve the problem. Explore solutions such as changing the meeting time or location to better fit members' schedules or offer the opportunity for members who travel long distances to virtually participate.

To move the meeting forward, follow some of these suggestions:
- Start by having an idea of the time required for each agenda item.
- Be clear about the goals of each agenda item: is it just an update or is a formal discussion needed?
- Bring discussion items requiring a conclusion to a close.
- Move discussion items that cannot be resolved to a future meeting for further discussion.

Ending the meeting on time is important and respectful of others. Members schedule their day around the CRCG meeting and generally have appointments or

assignments needing their attention after the meeting. To close a meeting on time, follow some of these suggestions:

- Start on time.
- Determine which agenda items are most important and are most urgent prior to the meeting.
- Cut or defer agenda items until the next meeting if the meeting is running late.

One of the quickest ways to impede participation in a CRCG meeting is to start late, end late, and get hung up on agenda items. Poorly managed meetings with inconsistent start times discourage attendance, timeliness, and productivity.

Guide the Discussion

Guiding a discussion means keeping it on subject, minimizing repetition of points, and moving the discussion toward closure. One of the dangers to clear and focused discussions is going off topic. The meeting facilitator is responsible for tactfully bringing the discussion back on topic. Some approaches to consider are:

- Maintain a "parking lot" to save ideas for future discussion. When the conversation goes off topic, use language such as, "You know, that's a great idea, but I think we should pick back up on what Maria is saying. Can we put this in the parking lot and come back to it later?"
- Visit the parking lot before the end of the meeting and decide what to do with the items there. Items may be discussed at that time or 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 going off topic. Ask the members to signify, in some agreed upon manner, when the group goes off topic.

Repeating the same point can bog down a discussion. When this happens, consider using the following cues:

- "As I understand it, the point you are making is… Is that correct? Is there anything else you want to add?"
- "Does anyone have something different they want to add to the discussion?"
- "Are there others who would like to support this point? Perhaps those in support could raise their hands and we'll note it and move on to the next point."

To move the discussion toward closure, have the endpoint in mind. Some things to consider are:

- Is action required by the CRCG or is this an informational discussion?
- If it is informational, ask if there are one or two final points to be made. Ask a discussion leader for summation.
- If it is an action item, ask if someone would offer a tentative consensus.

- If there is no agreement, ask someone not in agreement to state their 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 how to proceed. Continue the discussion but drop the other agenda items? Defer further discussion to the next meeting?

Clarify Consensus

It is important all the members understand the decision that was made through consensus. Sometimes members might have different opinions about the decision. To address this, the Chair or meeting facilitator states the consensus and asks if all concur. The Secretary records the consensus as stated.

Conduct the Staffing

The development of the ISP is the core activity of the CRCG. As mentioned in previous sections, the CRCG should inform the individual or family about the CRCG staffing process, including the creation of their ISP. The CRCG must ensure that the individual or family members sign all appropriate consent forms and that each member in attendance has signed a confidentiality agreement or has one on file before hosting the staffing.

Below is a sample agenda for a staffing to develop an ISP:

Staffing agenda to develop an ISP
1. Welcome individual/family and representatives
2. CRCG member introductions
3. Individual, family, or caregiver information sharing
4. Identifying strengths and needs
5. Build the ISP
6. Summarize and approve the plan

(Repeat for each individual or family)

Introductions

Creating a welcoming environment and facilitating introductions set the tone for the CRCG meeting and staffings. Introductions should make the individual or family and other guests feel welcome and comfortable.

Some CRCGs have a member greet the individual or family before their meeting and answer any last-minute questions. When they arrive in the meeting room, the meeting facilitator should warmly welcome the individual, family, and anyone accompanying them. If available, provide water and a notepad and pen in case they want to take their own notes. Next, the referring member should introduce the individual or family being staffed and any other guests, including caregivers. Often

the referring member or the CRCG's family representative sits with the individual, youth, or family to provide additional support.

Members should introduce themselves to guests by briefly identifying who they are and what agency or services they represent. Name tents and name tags are helpful to ensure everyone knows each other and what agency they represent. Avoid using acronyms and if possible, provide the individual or family with a list of brief explanations of programs and services in attendance.

Try to open the staffing with a conversation or activity to help promote a comfortable place before sharing experiences. The meeting facilitator should then briefly review how the staffing will work and what to expect.

Individual, Family, or Caregiver Information Sharing

After introductions, the meeting facilitator will ask the individual or family to share how the CRCG can help. Before starting the discussion, consider the individual or family's felt safety. To create a safe space for discussion:
- Clearly explain their right to confidentiality and the limits thereof, including instances in which the right must be abridged.
- Practice strategic sharing: identify what information is supportive and needed.
- Be sensitive to information that may be difficult for the individual to share.
- Be mindful of the power dynamics between members and the individuals and families within the meeting.

Invite the individual or family to briefly identify what brought them to the meeting and what they need from the CRCG. If the youth is present, allow the youth to share their own information at the staffing and support them in strategic sharing. If the youth, individual, or family is not comfortable in this role, the referring entity such as a service coordinator or case manager may speak for them. This process should be planned in advance to ensure they are as comfortable as possible and know what to expect.

It is helpful for the facilitator to summarize what is being requested and to ask the individual 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 getting child support for your children and finding a better place to live. Is that correct? Would you like to add anything? Is there anything else you need?"

Identifying Strengths and Needs

Next, members should respectfully ask questions to identify strengths, clarify needs, and to increase their understanding of the individual or family's circumstances. Some things the CRCG may want to ask include:
- The types of services they received before and how successful they were.

- Their goals.
- Their strengths and supports.
- The types of activities they enjoy.

Remember to use language that is understandable for everyone, avoid acronyms or technical terms. Ask clear questions that help the individual or family feel that they are in control of the meeting. When asking questions, focus on what information is needed to make recommendations on the ISP. If the youth is present, include them in the conversation.

It is important to maintain a strengths-based approach and avoid focusing solely on the negative. Include questions that intentionally identify strengths and interests of the youth, individual, family, or caregiver(s). Questions should be specific to each person to help inform the ISP. Asking questions to elicit strengths also engages the individual or family and motivates participation in ISP planning and implementation. As the CRCG and the youth, individual, or family discuss their strengths and concerns, ensure that a CRCG member, typically the data reporter or secretary, is keeping track of the discussion with the Data Tracking Worksheet.

The meeting facilitator should summarize the strengths discussed and priority of needs and ask for confirmation from the individual or family.

Build the Individual Service Plan

Together, the CRCG and individual or family identify services and supports that match their identified strengths and address their needs. Before offering a service, members should take into consideration the individual's previous agency experiences and recognize systematic trauma that may have occurred that impacts their comfort level with providers and services. It is important to ask the individual or family for feedback to ensure that a service, resource, or action proposed would be beneficial and fits with their values, cultural beliefs, family structure, or routine. The CRCG may want to write down the services on a flip chart as they are being offered as a visual tool that supports discussion of the plan as it is developed.

One of CRCGs' goals is to help people stay in their communities, and whenever possible, the ISP should recommend community-based services. If services outside the community are necessary, they should be in the least restrictive environment possible. When placement is necessary, the ISP should include a reintegration plan for the individual to return to the community and family.

When explaining available services and supports, members provide essential information for each service, resource, or action, including timelines, contact information, potential costs/payment, etc. The time requirements of the service must be identified. For example:
- When will it start and end?
- Can it be extended?
- Are there pre-requisites to begin the service?

If the person served is a transition-age youth, keep their age in mind when suggesting recommendations. Discuss with them a plan to ensure that services and supports will continue as they transition to adulthood.

It is helpful to include next action steps in the ISP to clearly indicate what the referred person or organization is responsible for after the CRCG meeting. Action steps are specific efforts that are made to help the individual or family reach their goals. Many of the action steps should be the responsibility of the CRCG or assigned agency. They should be concrete and comprehensive, and each action step should explain:

- What will occur.
- Who will carry out the actions.
- When the actions will take place.

Summarize and Approve the Plan

After all the services and resources are identified, the individual or family and the providing entities review the recommendations together and reach an agreement on the plan. CRCG leadership should ensure that there is a method in place to assemble the plan elements into an ISP form during the meeting. The State CRCG Office provides an ISP template (available on the [website](#)) or the CRCG may create their own. As the recommendations are finalized, the member responsible for data tracking should make note of which services and supports are recommended in the Data Tracking Worksheet.

A CRCG representative and the individual or family need to sign the ISP recognizing that together they have identified services to promote the referred person's success. The individual or family and each participating organization should receive a copy of the ISP. The CRCG leadership must also maintain a copy for records keeping purposes.

The ISP will also include information about what agency or person will take the lead supporting the individual or family in implementing the plan. Usually this will be the organization that is contributing the most services or it may be the organization with whom the individual or family is most comfortable. If the individual or family has a case manager or a service coordinator, they should oversee the implementation of the ISP. The lead entity will maintain communication with other contributing entities to ensure services are provided in a coordinated manner. Release of information agreements must be in place between all participating entities to continue communication. The lead entity will report follow up information to the CRCG at prescribed intervals.

Maintain Staffing Records

Each staffing record should include the referral form, the ISP, release of information forms, sign-in sheets, copies of data collection forms, and any information from the individual or family made part of the ISP record. Records containing confidential

information and PHI must be handled according to state and federal laws such as HIPAA, as well as your agency's policies. Files containing confidential information will be stored in a locked cabinet behind a locked door. Retain records for two years after service coordination is conducted. After this time, documents containing sensitive and confidential materials must be destroyed.

The CRCG should determine who will be charged with maintaining these records. The Chair should ensure that, no matter who is keeping the records, adequate security measures are in place to maintain confidentiality.

Reflect on the Meeting

Consider adding a section at the end of the meeting to reflect on what went well and what can be improved. Members may identify strengths and weaknesses and make suggestions for future meetings. CRCG leadership may receive vital feedback to improve the CRCG process.

You may consider asking questions such as:
- What worked well today?
- What could we do differently from what we did today to make our interagency service planning process more effective?
- Who attended? Who didn't? Why? Can the CRCG process be more accessible for those who couldn't attend?

Members will be more invested in the meetings if they have the opportunity to help shape them. This will also help maintain active attendance at the meetings.

Follow Up

Following up with the individual and family and the involved entities after the staffing is a critical step in the CRCG process. When an ISP is built, next action steps or tasks are assigned and the CRCG should ensure that follow through on these steps happens on both sides, with the individual or family as well as the involved entities. Checking in to inquire if the recommendations are meeting the needs of the individual and family is also critical.

Follow Up with the Individual or Family

Follow up with the individual or family regarding their ISP is important to ensure that the CRCG's recommendations are a good fit. After the initial staffing, designate a CRCG member, typically the lead entity, to continually check in with the individual or family to assess if the recommendations are working or if they need assistance connecting with referrals. During a check in, be intentional about connecting with them, following up is an opportunity to emphasize that the CRCG is a resource to support their healing and recovery. Use a strengths-based perspective to discuss their progress and build upon what is working for them, even if it is a small achievement.

The check ins can occur as often as the CRCG sees fit. Typically, CRCGs schedule check in updates after one month to ensure that the individual or family is connected to services, three months to learn how the services are working and to decide if the plan needs to be adjusted at a follow up staffing, and six months to determine if the CRCG's assistance is still needed.

If the lead entity discovers that the ISP is not working, or additional services and supports are needed, the CRCG can schedule a follow up staffing to re-evaluate the plan. Follow up staffings are also scheduled to plan reintegration for a person returning to the community from placement.

When the CRCG's support is no longer necessary, remind the individual or family to contact the CRCG if they need additional services in the future.

Follow Up with Involved Entities

Initial follow up with the involved entities ensures that the individual or family is connected to services. The development and implementation of comprehensive ISPs is the focus of the CRCG and involved entities should provide continuous updates on an individual or family's progress on their ISP at designated intervals.
These tips can help ensure that involved entities follow through on the ISP:

- Assign a CRCG member, typically the recorder or secretary, to track any follow up work (i.e., action steps in the ISP a member was assigned) that needs to be completed.
- Include follow up updates in the agenda and send reminders to involved entities to prepare information for the upcoming meeting.
- Schedule a follow up staffing for an individual or family to update their ISP with services and supports to further accommodate their needs and strengths.

If follow through is not happening, find out why by asking questions such as:
- Is this situational or a pattern?
- Is the lead entity dropping the ball?
- Have the agencies who made commitments put this ISP on a "back burner"?
- Are individuals or families abandoning the plan? If so, work with them to identify potential barriers and solutions.

If poor follow through is occasional, address it on a case by case basis. Talk with involved parties and help them find ways to remove barriers.

If poor follow through is a pattern, address it with the entire CRCG. Lay out the issue and invite members to discuss barriers to implement the ISPs. The Chair or facilitator should keep the discussion focused with respect to all parties.

CRCG Continuous Quality Improvement

CRCG members are encouraged to regularly evaluate their CRCG, whether informally or formally. Evaluation may help the local CRCG in the following ways:
- Determine individual and family satisfaction with the CRCG process.
- Identify barriers of the program and assess community need.
- Identify priorities for training, education, and public awareness.
- Improve processes, clarify communication, and enhance cultural competence.
- Find out which participants benefit most from the program.
- Mobilize community support and broaden consensus among partners.
- Identify which partners are missing from CRCG membership. A sample letter to invite local agencies and programs to your CRCG can be found in [Appendix H](#).
- Determine the effects of the program.
- Decide where to allocate new resources.
- Document success in accomplishing objectives and gather success stories.

Utilize CRCG meetings without a staffing or host an annual organizational meeting to have members discuss evaluation methods; the needs, structure, and processes of the CRCG; and areas in need of improvement. Brainstorm ways to gather individual and family feedback, like incorporating evaluation questions at a check in or follow up staffing.

Report Monthly CRCG Outcomes

Collecting local CRCG meeting information is vital to the work and development of CRCGs. The information revealed through data allows CRCGs and the State CRCG Office to assess the impact of CRCGs, identify service gaps and barriers, informs future efforts, and demonstrate performance.

At the local level, CRCGs may utilize their data to:
- Inform partner agencies and the larger community.
- Address gaps and barriers in the community.
- Access funding opportunities.
- Engage in new partnerships.
- Celebrate successes.

The State CRCG Office uses information from CRCG reporting and Satisfaction Survey responses to inform and tailor training, TA, and resources. It is also used to create the biennial legislative report demonstrating the effectiveness of community efforts to coordinate human services and supports, as well as to document the need for additional services and resources. The legislative report includes data related to the following areas:
- Number of people served through CRCGs.
- Information on recommended services and outcomes of the services provided.
- Identified barriers that impact the 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.

CRCG Data Collection System

The State CRCG Office hosts a statewide data collection system to allow CRCGs to report information in a consistent manner. CRCGs report monthly aggregate data about their meetings, including people served, partners involved, ISP recommendations, and barriers encountered.

CRCGs can use the CRCG Data Collection System to generate reports that provide a unique and individualized snapshot of their CRCG that can help local communities target efforts to address the needs of their community. The same data may also be used to help explain how a given grant or program would target a gap in services for a specific population.

Each CRCG must designate a data reporter to input the CRCGs' monthly data. Often a CRCG leader, such as a Secretary or Co-Chair will be the data reporter. If the CRCG does not have a designated data reporter, it is recommended to assign or

volunteer a member to track and input the monthly data (this can be a one-time task or a continuous responsibility).

The State CRCG Office understands that collecting and reporting CRCG information may be a challenge for some and has developed tools, such as the Data System User Guide and Data Tracking Worksheet (available within the data system), to make the process as quick and easy as possible.

To get access to the data collection system and user guides, or for training and TA, contact the State CRCG Office at (512) 206-5255 or CRCG@hhsc.state.tx.us.

Satisfaction Survey

After allowing some time for the individual or family to process their meeting, CRCGs should encourage all people assisted by CRCGs to complete the Satisfaction Survey (available on the CRCG website), whether they are the direct recipients or a family member or supporter. The survey is designed to capture their experiences and provides direct feedback to the State CRCG Office. CRCGs can include a link to this survey on completed ISPs to encourage participation. Think about what will work best in your process and community to obtain the most survey responses.

The brief survey is provided in English and Spanish and is accessible by smart phone, tablet, or computer, making it easy and quick to complete. A printable copy is available on the website. Survey respondents will remain anonymous unless they choose to provide their name and contact details. The survey questions are listed in Appendix I.

Dispute Resolution

Even when there is a high level of cooperation and coordination among members, there may be situations where disputes arise. Possible areas of dispute might include:
- Legal limitations
- Follow up of services
- Scope and responsibility of an agency's role in an ISP
- Eligibility criteria

If properly managed, conflict can be a great source of creativity, innovation, and team building. If a conflict does emerge, address it and discuss the issues. Working towards a resolution can result in creative approaches that were not previously considered. Techniques that can help you avoid and manage conflict include:
- Listen to understand. Being heard is key to feeling part of a group. Ensure that every member has the chance to be heard by creating space and opportunities for them to speak. Enforce respectful, active listening (receiving information without judgement).
- Use the agenda and ground rules. If someone continually goes off topic throughout the meeting, remind everyone of the agenda and ground rules the group agreed on.
- Do not be defensive.
- Take a break and give everyone a chance to recollect their thoughts.
- If necessary, talk to the disruptive person outside of the meeting room to discuss their behavior and possible solutions.

If the issue is especially heightened or if you are seen as aligned with one side or the other, it might be useful to bring in a neutral mediator to facilitate the discussion. CRCGs operate by consensus to help avoid unnecessary splintering of the CRCG. While voting might divide the CRCG, in consensus, all must come to agreement.

Interagency Dispute Resolution

Conflicts might emerge between members regarding agency programs or policies. If the issue is irresolvable by the members or threatens the stability and effectiveness of the CRCG, the issue can be turned over to mediators to resolve. The CRCG MOU requires each state agency to designate a negotiator who is not a member of any local CRCG to resolve disputes. The negotiator must have:
- Decision-making authority over the agency's representative on the local CRCG; or
- 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 sends the designated negotiators for those

agencies written notification that a dispute exists. Within 45 days of receiving the written notification, the negotiators shall confer 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 Executive Commissioner. Contact the State CRCG Office at (512) 206-5255 or CRCG@hhsc.state.tx.us for further assistance.

Appendix A. List of Acronyms

Acronym	Full Name
CRCG	Community Resource Coordination Groups
DFPS	Texas Department of Family and Protective Services
DSHS	Department of State Health Services
H.B.	House Bill
HHS	Health and Human Services
HHSC	Health and Human Services Commission
HIPAA	Health Insurance Portability and Accountability Act
ISP	Individual Service Plan
LBHA	Local Behavioral Health Authority
LIDDA	Local Intellectual and Developmental Disability Authorities
LMHA	Local Mental Health Authority
MOU	Memorandum of Understanding
OMHC	Office of Mental Health Coordination
PHI	Protected Health Information
S.B.	Senate Bill
SMHF	State Mental Health Facility
TA	Technical Assistance
TCOOMMI	Texas Correctional Office on Offenders with Medical or Mental Impairments
TDCJ	Texas Department of Criminal Justice
TDHCA	Texas Department of Housing and Community Affairs
TEA	Texas Education Agency
TJJD	Texas Juvenile Justice Department
TWC	Texas Workforce Commission

Appendix B. Texas Government Code, Section 531.055

MEMORANDUM OF UNDERSTANDING ON SERVICES FOR PERSONS NEEDING MULTIAGENCY SERVICES.

(a)   The Health and Human Services Commission, the Department of Family and Protective Services, the Department of State Health Services, the Texas Education Agency, the Texas Correctional Office on Offenders with Medical or Mental Impairments, the Texas Department of Criminal Justice, the Texas Department of Housing and Community Affairs, the Texas Workforce Commission, and the Texas Juvenile Justice Department shall enter into a joint memorandum of understanding to promote a system of local-level interagency staffing groups to identify and coordinate services for persons needing multiagency services to be provided in the least restrictive setting appropriate, using residential, institutional, or congregate care settings only as a last resort. The division within the Health and Human Services Commission that coordinates the policy and delivery of mental health services shall oversee the development and implementation of the joint memorandum of understanding.

(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:

      (A)   family preservation and strengthening;
      (B)   physical and behavioral health care;
      (C)   prevention and early intervention services, including services designed to prevent:
         i.   child abuse;
         ii.   neglect; or
         iii.   delinquency, truancy, or school dropout;
      (D)   diversion from juvenile or criminal justice involvement;
      (E)   housing;
      (F)   aging in place;
      (G)   emergency shelter;
      (H)   residential care;
      (I)   after-care;
      (J)   information and referral; and
      (K)   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 in a manner that defines, supports, and maintains local autonomy;

(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.

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

(d)   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.

(e) The agencies shall ensure that a state-level interagency staffing group provides:

    (1) information and guidance to local-level interagency staffing groups regarding:

        (A) the availability of programs and resources in the community; and

        (B) best practices for addressing the needs of persons with complex needs in the least restrictive setting appropriate; and

    (2) a biennial report to the administrative head of each agency, the legislature, and the governor that includes:

        (A) the number of persons served through the local-level interagency staffing groups and the outcomes of the services provided;

        (B) a description of any barriers identified to the state's ability to provide effective services to persons needing multiagency services; and

        (C) any other information relevant to improving the delivery of services to persons needing multiagency services.

(f) In this section, "least restrictive setting" means a service setting for a person that, in comparison to other available service settings:

    (1) is most able to meet the identified needs of the person;

    (2) prioritizes a home and community-based care setting; and

    (3) engages the strengths of the family.

Appendix C. Memorandum of Understanding

Joint Memorandum of Understanding for Coordinated Services to Persons Needing Multiagency Services

Visit the CRCG website (https://crcg.hhs.texas.gov/) for the MOU.

Appendix D. New CRCG Checklist

Below is a checklist to help prepare new or expanding Community Resource Coordination Groups (CRCGs). The following steps provide a chronological order of procedures to help ensure the creation, revival, or maintenance of an effective CRCG. The items on this checklist are not exhaustive, however they serve as a starting point.

The State CRCG Office recommends accessing the CRCG website for a thorough review of the resources listed below. These resources will provide you with a clear understanding of the key components required to start or maintain a CRCG.

Important Resources for CRCGs (available on the CRCG website):
- CRCG Guiding Principles
- CRCG Memorandum of Understanding (MOU)
- CRCG Handbook
- CRCG Toolkit
- Data Collection System requirements and resources (contact the State CRCG Office for these documents)

☐ **Identify state agencies and leaders in your area who provide human services and supports to your community.** In 2018, leadership from the following state agencies signed a Memorandum of Understanding (MOU) requiring representatives from these state agencies and local offices to participate in the CRCG program:
- Texas Health and Human Services Commission (HHSC)
- Texas Department of Family and Protective Services (DFPS)
- Texas Department of State Health Services (DSHS)
- Texas Department of Criminal Justice (TDCJ) - Texas Correctional Office on Offenders with Medical or Mental Impairments (TCOOMMI)
- Texas Juvenile Justice Department (TJJD)
- Texas Education Agency (TEA)
- Texas Department of Housing and Community Affairs (TDHCA)
- Texas Workforce Commission (TWC)

☐ **Identify additional key organizations and leaders in your area who are knowledgeable and provide resources and support to your community.** These leaders may include representatives from the local school district, local mental health authorities, local non-profits, community or faith-based organizations, parents, and family members.

☐ **Reach out to key leaders to determine a date, time, and a centralized meeting location for an initial organizational meeting.** If you need help identifying your local state agency representatives, email the State CRCG Office.

☐ **Develop an initial organizational meeting agenda to include:**
- What are CRCGs

- Key state and local representatives
- Examples of CRCGs in other counties (if available)
- The CRCG process and what it will look like in your county
    - Leadership Team (See Leader Roles and Responsibilities)
    - Regular Meetings (See Host the CRCG Meeting)

☐ **Host an initial organizational meeting.** (See Host the Organizational Meeting). **Based on the needs of your community plan to discuss:**
- What age groups will we serve?
- How many counties will we serve?
- How often will we meet?
- Where and when will we host our regular meetings?
- What CRCG member roles will we have and how will we select members for leadership roles? How long will leadership roles be held?
- What will be our referral process and selection/screening criteria for referrals?

☐ **Create CRCG Mission Statement.** (See Determine the CRCG's Organizational Structure)

☐ **Create/determine CRCG bylaws or policies and procedures.** (See Determine the CRCG's Organizational Structure)

☐ **Select leadership team and roles.** (See Leader Roles and Responsibilities)

☐ **Notify the State CRCG Office of your new CRCG, your leadership contact information, and an email list of all your members.** Send this information to CRCG@hhsc.state.tx.us.

☐ **Create/develop communication guidelines or ground rules for regular meetings.** (See Determine the CRCG's Organizational Structure)

☐ **Create consent and release of information forms in adherence to state and federal laws and individual agency policies.** (See Consent and Release of Information)

☐ **Notify all partners (including those unable to attend the meeting) that the CRCG is active and accepting referrals.** Inform partners of the referral process and any eligibility requirements for referrals.

☐ **Begin referring eligible clients to the CRCG.**

☐ **Begin holding regular CRCG meetings.** (See Host the CRCG Meeting)

☐ **Report information about your staffing meetings each month to the State CRCG Office using the CRCG Data Collection System.** Contact the State CRCG Office for access to the system and training in how to use it.

Appendix E. Sample Invitation to Organizational Meeting

Use this template to invite local partner agencies and programs to an organizational meeting for your CRCG.

Dear *(insert name or agency)*,

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 to plan for services with these individuals and their caregivers before they slip through the cracks of the system?

Around the state, county-based Community Resource Coordination Groups (CRCGs) deal with these issues. CRCGs are local interagency groups composed of public and private agencies that develop service plans with children, families and adults whose needs can be met only through interagency coordination and cooperation. Among the agency partners are representatives from eight state agencies who have entered into a formal agreement to work together with local entities to facilitate the development and ongoing support of CRCGs for children, youth, and adults across Texas. To learn more, click here.

Benefits of CRCGs
- Connect people to community-based resources and supports
- Address service gaps and barriers by stretching existing resources and identifying new resources
- Increase awareness of and coordination between community resources
- *(Add any additional benefits to encourage this agency to attend the organizational meeting)*

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 CRCGs in other counties and to discuss the possibility of establishing a CRCG for *(insert county/counties name[s])*. We will discuss the specific challenges in our area.

As a leader in this community and as an agency serving *(insert specific population served)* in this community, your participation in this effort is needed. If you are unable to attend, please send someone else to represent your agency.

Please RSVP *(insert name/phone number/email)* by *(insert date for RSVP).*

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

Making a difference in the lives of Texans with complex needs - one at a time.

Sincerely,
(insert name[s]/signature[s])
(insert Agency[ies])

Appendix F. Sample Agenda for Organizational Meeting

This agenda can be used as the basis for a meeting where partners come together to develop a new CRCG. It can also be modified to serve as an orientation to the CRCG for new partners.

CRCG Organizational Meeting
Date
Time
Place

Welcome and Introductions

What are CRCGs?
- What are the benefits?
- Why is it needed in our community?

What do we need to consider to establish our CRCG?
- What age groups will we serve?
- How many counties will we serve?
- Where and when will we host regular meetings? How often will we meet?
- What will our referral process and screening criteria look like?
- How will we get referrals?
- What forms do we need?

CRCG Membership
- What organizations and community partners need to be part of the CRCG?
- What CRCG leader roles will we have and how will we select members for these roles?
- How long will leadership roles be held?

Considerations and Decisions

Next Steps
- Set up follow up meeting to determine CRCG structure (mission, bylaws, ground rules) and discuss and elect leaders.

Appendix G. Sample CRCG Bylaws

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

   The CRCG's role is to connect individuals and families with community services and supports through the creation of Individual Service Plans (ISPs), identify gaps and barriers in their community, and find creative solutions through partnerships and collaboration to address the community's needs.

2. Model and Guiding Principles
   The CRCG adheres to the CRCG Model and Guiding Principles.

3. Attendance and Participation
   All participating entities agree that attendance at the CRCG meeting is important. The CRCG requires the cooperation and participation of all members to meet the needs of referred individuals and families. Attendance and participation at every meeting are strongly supported and encouraged.

4. Membership
   CRCG membership 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 entity. At a minimum, resources include time and services.

5. Confidentiality, Consent, and Release of Information
   a. The CRCG meetings are open, however, CRCG staffings are restricted to members of the CRCG and invited organizations who are relevant to the staffing and have signed the CRCG's confidentiality agreement.
   b. Every CRCG participant who has relevant information regarding the referred individual or family is to secure a written release of information prior to the meeting. The CRCG must also obtain a consent from the individual or parent or legal guardian (as appropriate) to participate in the CRCG meeting.
   c. All information shared in the CRCG is confidential. Each member must comply with applicable state and federal confidentiality laws, as well as individual agency policies. Information obtained at the meeting is not to be shared outside the CRCG except as needed to secure resources for the family or individual and only if a release of information is obtained.
   d. All participants shall sign confidentiality agreements prior to the staffing.

6. Leaders and Responsibilities

a. CRCG leaders shall be the Chairperson, Co-Chair, and Recorder. The Co-Chair 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 year. The Recorder will assume this responsibility in the absence of the Chairperson and Co-Chair.
b. Terms of office are one 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:
   i. Preside at all meetings;
   ii. Orient new member entities of the purpose, policies and procedures of CRCG;
   iii. Ensure that appropriate consents have been obtained by the referring entity; and
   iv. Ensure that a service plan is developed and designate the representative responsible for ensuring that the plan is followed.
d. 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-Chair. The recorder is also responsible for submitting monthly staffing data into the statewide data collection system.

7. Meetings
CRCG meetings 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 CRCG.

8. Staffing/Criteria for Referral
CRCG referrals for staffing may be received from a member, local agencies or community organizations, family or peer representatives, or individuals or families whose needs can only be met by interagency cooperation. Staffings will be restricted to representatives who are members of the CRCG.

The CRCG leader or another designated member must review the case to determine its appropriateness for a CRCG staffing.

Prior to referral to the CRCG, the referring entities shall take the following steps:
a. Explore existing resources within and outside their organization;
b. Consult with their representative to the CRCG;
c. Complete the local CRCG referral procedure.

9. Responsibilities of Referring Entity
a. Assess criteria for eligibility and contact the Chairperson or designee to schedule a staffing;

b. Ensure the required document(s) for sharing confidential information are complete prior to the meeting. If the individual has a guardian, ensure that individual has signed all appropriate documentation;

c. Ensure the individual and/or family, guardian, advocate, or other involved individual(s) are present for the staffing;

d. Provide information to the CRCG members present on the needs of the family or individual, 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
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 CRCG
a. Discuss and prioritize the unmet needs of the family or individual based on information presented during the staffing;

b. Identify additional resources available to address the unmet needs;

c. Incorporate the needs and recommendations in a service plan, identifying persons responsible for implementing strategies in the plan and timelines for completion and follow up review;

d. Identify inadequacies or gaps in services and resources;

e. Develop plans and/or make recommendations to public and private entities for alleviating service gaps or improving services.

12. Record Keeping
a. The Chairperson or designee will maintain a roster including the name, mailing address, email address, and telephone numbers of the CRCG membership and will distribute it as needed/requested;

b. The referring entity will maintain the original service plan in the individual or family's record. Other entities involved may maintain a copy of the service plan or incorporate information, i.e., 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 two 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 submit data to the State CRCG Office using the statewide data collection system.

Appendix H. Sample Invitation to CRCG Meeting

Use this template to invite local partner agencies and programs to your CRCG.

Dear *(insert name or agency)*

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 to plan for services with these individuals and their caregivers before they slip through the cracks of the system?

Around the state, county-based Community Resource Coordination Groups (CRCGs) deal with these issues. CRCGs are local interagency groups composed of public and private agencies that develop service plans with children, families and adults whose needs can be met only through interagency coordination and cooperation. Among the agency partners are representatives from eight state agencies who have entered into a formal agreement to work together with local entities to facilitate the development and ongoing support of CRCGs for children, youth, and adults across Texas. To learn more, click [here].

Benefits of CRCGs
- Connect people to community-based resources and supports
- Address service gaps and barriers by stretching existing resources and identifying new resources
- Increase awareness of and coordination between community resources
- *(Add any additional benefits to encourage this agency to become a member)*

(Insert local CRCG name) serves *(insert population served)* in *(insert county[ies] served)*. Currently, our CRCG has a wide variety of active members from *(insert agency names here)*. Our CRCG typically meets on *(insert timeframe)* to staff individual cases, network, and share information about each other's programs and resources.

We have identified *(insert agency name)* as a partner necessary to make multiagency care coordination successful. **We would like to invite a representative from your agency to our next CRCG meeting on *(insert date, time, place)*. Please RSVP to *(insert name/phone number/email)* by *(insert date for RSVP)*.**

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

Making a difference in the lives of Texans with complex needs - one at a time.

Sincerely,

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

Appendix I. CRCG Satisfaction Survey

Welcome to the CRCG Satisfaction Survey. Community Resource Coordination Groups (CRCGs) want to hear about your experience. We are always looking for ways to improve, as well as celebrate people and communities who are making a difference. Please take a few minutes to fill out this brief survey. Your responses will be anonymous.

Please return this form to your local CRCG or the State CRCG Office at 8317 Cross Park Drive, Suite 350, Mail Code: 1155, Austin, Texas 78754 or CRCG@hhsc.state.tx.us. If you would like to provide us with any additional information, you can email the State CRCG Office or call (512) 206-5255.

1. I am a:
☐ Parent/caregiver ☐ Youth or young adult between 13 and 22 years old

☐ Adult served by the CRCG ☐ Other (please specify):

_____

2. Overall, how would you rate your experience with your Community Resource Coordination Group (CRCG)?
☐ Very satisfied ☐ Dissatisfied

☐ Satisfied ☐ Very dissatisfied

☐ Neither satisfied nor dissatisfied

3. What did you like about the CRCG process?

4. What did you dislike about the CRCG process?

5. Prior to the CRCG meeting, did you feel prepared on what to expect during the meeting?
☐ Extremely prepared ☐ Not so prepared

☐ Very prepared ☐ Not prepared at all

☐ Somewhat prepared

6. How supportive were the CRCG leaders and members?

☐ A great deal   ☐ A little

☐ A lot   ☐ None at all

☐ A moderate amount

7. Did the CRCG provide a plan and clear next steps for connecting to recommended services and supports?

☐ Yes   ☐ No

☐ Somewhat   ☐ Other (please specify):

_____

8. Did the CRCG meet your needs?

☐ All   ☐ A few

☐ Most   ☐ None

☐ Some

9. Were you told who to reach out to if you had questions about your plan or service recommendations, and provided contact information for that person?

☐ Yes   ☐ No

10. Is there anything else you would like to share about your CRCG experience?