A TOOL FOR PREPARING TO LEAD
A Care Team Leadership Training Conference

Consultant’s Guide

THE CARE TEAM NETWORK
Consultant's Notes

The Care Team Network
Community Care Building, Suite 184
908 South 20th Street
Birmingham, AL 35294-2050

Phone: 205-975-9129
Toll Free: 1-877-614-9129
Fax: 205-975-6448
E-mail: careteam@uab.edu
Web site: www.careteam.org
Introduction

The Care Team Network is fortunate to involve many talented individuals, like you, to serve as one of our Consultants. We hope this resource will be a valuable tool for you, and we welcome your new ideas and teaching styles. Let us know your suggestions so we can share it with others!

The following notes will guide you in teaching a Care Team Leadership Training Conference (LTC) sponsored by The Care Team Network. By following the main outline, we can work together to insure we have the same quality instruction and content at each conference.

You will see icons throughout the Consultant’s Notes as a quick reminder of different types of information.

The “Purpose of Section” icon gives an overview of an exercise or component. “Materials Needed” and “Time Savers” are self-explanatory.

The “Consultant” icon, ☑, represents actual words used by the CTN Staff in past conferences as we were teaching this section. Of course you can use your own words, but we thought it would be helpful to know what has been said in other conferences. A “Teaching Tip,” is sometimes provided and a “Next Slide” icon, □, is placed when it is time to advance to the next slide. The actual slide is provided in your notes.

Since you have been involved in developing Care Teams, please feel free to share stories and lessons you have learned with LTC participants throughout the conference.

Additional Resources and Handouts

- The Care Team Network will ship the LTC Guidebooks to the conference location a couple of days before the conference begins.

- The LTC Day One Video Series (each videotape is a separate component of the day) is available to you as an example of how to lead each section. It was filmed at a LTC in November 2002 taught by the CTN Staff. Please contact the CTN if you would like any or all copies of the series.

- The LCD Projector will be provided for you with the PowerPoint slides on an internal memory stick (no laptop is needed). The Projector will be shipped to you approximately one week before the conference. Our goal is to make the slide set up as simple as possible. Operating instructions will be provided.
• In the back of the Guidebook, you will find a section called "LTC Handouts" that includes a copy of the Schedule, PowerPoint slides, and Evaluation form.

We are so glad to have you as part of The Care Team Network’s Consultant Team!
# Overview of Schedule for Day One

**Trainer**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Speaker</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>Check-in (Continental Breakfast)</td>
<td>Malcolm</td>
</tr>
<tr>
<td>9:00-9:15</td>
<td>Welcome, Purpose, Overview, Hopes and Dreams</td>
<td>Malcolm</td>
</tr>
<tr>
<td>9:15-10:00</td>
<td><strong>BEGINNING</strong> is all about helping people discover</td>
<td>Maryanne</td>
</tr>
<tr>
<td></td>
<td>• People Who Need Care</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• People Who Want to Care</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• A Team Approach</td>
<td></td>
</tr>
<tr>
<td>10:00-10:30</td>
<td>Discovery With A Potential Care Team Friend – an initial visit</td>
<td>Malcolm</td>
</tr>
<tr>
<td>10:30-10:45</td>
<td>Break/Mingling Exercise (Meet 3 new people)</td>
<td></td>
</tr>
<tr>
<td>10:45-12:00</td>
<td><strong>BUILDING</strong> prepares the persons who want to care</td>
<td>Maryanne</td>
</tr>
<tr>
<td></td>
<td>Care Team Orientation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Offering Emotional Support as a Team Member</td>
<td>Maryanne</td>
</tr>
<tr>
<td></td>
<td>• Understanding the Care Team Model</td>
<td>Malcolm</td>
</tr>
<tr>
<td>12:00-12:50</td>
<td>LUNCH</td>
<td></td>
</tr>
<tr>
<td>12:50-1:45</td>
<td>Care Team Orientation continued</td>
<td>Maryanne</td>
</tr>
<tr>
<td></td>
<td>• Setting Boundaries and Limits as a Care Team Member</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Next Step: Set Connecting Visit, First Care Team Meeting</td>
<td>Maryanne</td>
</tr>
<tr>
<td>1:45-2:00</td>
<td>Exploring different roles for me</td>
<td>Malcolm</td>
</tr>
<tr>
<td>2:00-2:30</td>
<td><strong>CONNECTING</strong> sets expectations with the CTF</td>
<td>Malcolm</td>
</tr>
<tr>
<td></td>
<td>• Connecting Visit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• First Care Team Meeting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Follow-up with Care Team Friend</td>
<td></td>
</tr>
<tr>
<td>2:30-2:40</td>
<td>Stretch Break</td>
<td></td>
</tr>
<tr>
<td>2:40-3:30</td>
<td><strong>CARING</strong> revolves around the Care Team Meeting</td>
<td>Maryanne</td>
</tr>
<tr>
<td>3:30-3:40</td>
<td>Stretch Break</td>
<td></td>
</tr>
<tr>
<td>3:40-4:00</td>
<td><strong>SUPPORTING</strong> the team keeps it healthy</td>
<td>Malcolm</td>
</tr>
<tr>
<td></td>
<td>• Layers of Support offering and receiving Support:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The Care Team Leader, The Coach, The Leadership Team</td>
<td></td>
</tr>
<tr>
<td>4:00-4:10</td>
<td>Stretch Break</td>
<td></td>
</tr>
<tr>
<td>4:10-4:30</td>
<td><strong>NETWORKING</strong> with CTN &amp; community resources</td>
<td>Malcolm</td>
</tr>
<tr>
<td></td>
<td>• Review Six Components</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Role of Care Team Network</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Roles of other agencies, organizations</td>
<td></td>
</tr>
<tr>
<td>4:30-4:45</td>
<td><strong>Closing</strong></td>
<td>Malcolm</td>
</tr>
<tr>
<td></td>
<td>• Evaluation and Circle of Care</td>
<td></td>
</tr>
</tbody>
</table>
BEGINNING is all about helping people **discover**

**Preparation before the conference begins**

7:45 - 8:30   **Planning Team arrives** to setup (LCD Projector, registration, breakfast, decorate room, etc.).

8:30- **Registration, Continental Breakfast**

**Greeter(s)** - establishes welcoming environment, directs people to registration, helps with questions.

Registration – check-in participants, receipts, CE Credit, guidebooks and handouts

**Welcome**

**9:00-9:15 a.m.** (Malcolm)

**Overview.** The purpose of the first fifteen minutes is to welcome participants, introduce them to The Care Team Network and the Guidebook, and give a quick overview of the purpose of the conference. You will also want to get participants involved as soon as possible by asking them why they came to the conference. The sooner we get participants involved the more they are engaged throughout the day.

Welcome to The Care Team Leadership Training Conference sponsored by The Care Team Network!

- Introduce yourself and relationship to The Care Team Network (CTN)
• Mission of The CTN

Our mission is to train and support persons, congregations, and organizations in the development of Care Teams for persons with any need.

• LTC Purpose

- Day One—Fundamentals
  - Catch the vision of Care Teams.
  - Understand the basics of the Team process.
  - Learn how you can start, train, and maintain Care Teams.

- Day Two—Application
  - Explore strengths and challenges of your setting.
  - Practice starting, training, and maintaining Care Teams in your setting.
  - Learn how to develop a Leadership Team for your setting.

• Tools for the Day—Guidebook and Handouts and a word about copyright—we don’t have one! We want you to use our material however you want to apply it. The most important thing is we want you to use it!
• Quick Overview of Team Building. We’ll focus on the first four today (Beginning, Building, Connecting, and Caring).

• Would a few of you share why you have come to this Care Team Leadership Training conference? What motivated you to attend?

• We want to move right into BEGINNING, and instead of telling you how you can do this in your setting, let’s experience it first, then we’ll talk about it.

A Discovery Event
9:15-10:00 a.m. (Maryanne)

Overview. The purpose a Discovery Event is to help participants discover persons who need care (real-life situations they already know about), how they would like to care if they could choose (what they love to do), and finally help them understand the Team approach (or at least a brief overview of it).

✓ Teaching Tip. Seating: Take a moment and ask participants to move to a table in groups of four or five where they are not sitting with anyone from their congregation or organization.
We’ve discovered that they will learn a lot more when sitting with people from different settings. Ask them to stay in these groups throughout the day.

**Introductions.**

Let’s take a moment to introduce ourselves to the larger group so that we know where we are from and maybe discover what some of us have in common. (Example: My name is Malcolm Marler and I am the Director of The Care Team Network in Birmingham, AL.)

**Teaching Tip.** If you have more than twenty persons present, let them introduce themselves to one another in their small group and then briefly let them call out what cities or towns they are from after a few minutes. You can then have them call out the different denominations or types of organizations they represent.

**People Who Need Care.**

Format: Large Group Facilitator/ Small Group

Who are people that you know who need care? He or she might be someone in your own family, a neighbor, a co-worker, a member of your congregation. They could be someone you know with a chronic illness, someone who just came home from the hospital, a frail elderly person, or someone is going through a transitional time. How could they be helped in specific ways?

In your Table Groups, describe their situation and a few of their needs. You don’t need to mention the names of people. Discuss for about 5 minutes. (Large Group: Ask for 2-3 examples)
People Who Want to Care.

Materials Needed.

Read “Sharing the Care Is for Everybody” by Carol Padgett (See Guidebook).

✓ Teaching Tip. You may want to read one line and have the participants read alternating lines similar to a liturgy. Format: Large Group Facilitator/Small Group

Who is it that wants to care? Almost everyone wants to make a little difference in someone’s life.

What prevents us from caring? Or what are barriers that keep others and us from getting involved?

We all have gifts! Think about the kinds of things you like to do for others, or things that are easy for you to do. Another way of thinking about it is what energizes you when you offer it to another?

Think out of the box, not what you should do, but what do you love to do for others?

(Discuss for about 5 minutes in their table groups.)

(Large Group: Ask for a several examples in “popcorn, quick style.”)

A Team Approach

Format: Large Group
What is A Team Approach to Caring?

Team Principles

- Discovery
- Preparation
- Time Flexibility
- Respect for persons
- Time Efficiency
- Boundaries
- Working together to share the care

Discovery -- what you love to do, who needs care, the team approach
Preparation -- Care Team Orientation to prepare team members
Time Flexibility -- do what you can, when you can
Respect for persons -- make sure someone needs and wants a Care Team, respect privacy and independence
Time Efficiency -- Coordinated effort among team members
Set Boundaries -- important to know what we can and can’t do
Working together to share the care -- doesn’t depend on one person

Next Steps –

Format: Large Group

So, where do we go from here (In a real discovery event, we would complete this below, but they don’t have to here.)

- Exploration Form – a resource to help write down some things discovered.
- Follow up with some of the persons with needs identified this morning
- Care Team Orientation is next!

Review the Discovery Event outline.

This has been one example of discovery.
We've experienced one way to begin the process of discovery. Remind participants that discovery events can happen in all different settings and can last 5 minutes or an hour.

Discovery can even happen in a one-on-one conversation when talking with a friend. If one of you knows someone who needs care, both of you share what you would like to do for them. Check with the potential Care Team Friend to see if it is ok if a few friends organize care. Brainstorm how to invite others to participate, plan a Care Team Orientation and begin!

Remind participants of the three key points of a discovery event:

- People need care (identifying a person or family);
- People want to care (helping people be free to offer what they want to offer and do); and
- A Team Approach helps people work together to share the care!

Questions

10:00-1030 Discovery Process with a Potential Care Team Friend (Malcolm)

Format: Role Play in front of Large Group

We now consider how Discovery works with the person(s) who may need caring or be a potential Care Team Friend.

From the Discovery Event, we learned of many people who had needs.

Ask for a volunteer to play the Care Team Friend, and you will visit him/her and just ask them questions (or ask your co-trainer).

Emphasize in the visit:

- Is a Care Team appropriate after listening to needs?
- Briefly explain what a Care Team is
- Is the team wanted, or do they need more time to think about it?
- Explore possible starting points for a team
- Share the steps of what will happen next.

The Initial Visit

- Is a Care Team appropriate?
- Briefly explain what a Care Team is
- Is the team wanted?
- Explore possible starting points
- Share the next steps

See Guidebook, page 30
Questions from the large group about the visit? What did you observe or notice about the visit?

10:30—10:45 Break/Mingling Exercise  (Meet 3 new people)

10:45—12:00 **BUILDING: A Process Of Preparing Persons Who Want To Care**  
(Maryanne)

**Format:** Large Group, Powerpoint Slides

Building is focused on preparing a team through Care Team Orientation.

Give overview of the three Components of Building or Care Team Orientation.

**BUILDING**

Three components to Care Team Orientation:

- How to Provide Emotional Support  
  Interactive exercise
- Understanding the Care Team Model  
  - Discussion, handouts, or slides
- Setting Boundaries and Limits  
  - Scenarios that are discussed in small groups

CTO (Care Team Orientation) can be led in three – one hour sessions (or less) or in separate sessions. Be flexible! Orientation can be shorter or longer depending on the group and its needs.
Welcome to CARE TEAM ORIENTATION

- How to Provide Emotional Support
- Understanding the Care Team Model
- Setting Healthy Boundaries & Limits

See Guidebook, page 30

Offering Emotional Support as a Team Member (Maryanne)

Format: Small Group Exercise

See Lesson Plan for leading this paper exercise in the Guidebook p. 44 and following.

Break

Understanding the Care Team Model (Malcolm)

Format: Large Group, Powerpoint Slides
Teambuilding Exercise

Format: Large Group Facilitator/ Small Group Exercise

Would one person put something in the middle of your table from your pocket or purse.

(Bring items to the training or just have participants find something in their pockets of purses.)

Ask each table to brainstorm as many ways they can discover to use the item. Be very creative.

Review what the tables came up with after about 3-5 minutes.

How is this different than if you had to do it individually? What dynamics did you notice? (i.e. More fun, more ideas, bonding, creativity, more energy.)

Working as a team can be like this!

Share the Green Bean Casserole Rule: See Stories Section in the Guidebook

Main Point of the Green Bean Casserole Rule: You may love to do something or to offer something, but we always want to ask the Care Team Friend or Family if they would like to receive it. It’s a respect of persons.

Review Care Team Covenant

Helpful hint: In teaching about the Care Team Model, don’t just use PP slides. Just highlight the basics and let people ask questions instead of trying to teach them everything.
Attend Care Team Orientation. Even those with lots of healthcare experience need to attend in order to think team!

Be committed to a team concept and issues of confidentiality. Confidentiality within the team means not keeping individual secrets between member and Friend, but sharing important issues within the team. Confidentiality means not sharing issues outside the team.

Part of a team concept is the Care Team Meeting. Why is this important?

- We want to understand each other’s experience (communicate).
- We want to learn something new that will help us in our caring of this person, situation or family (educate).
- We want to coordinate what we will do in the next 4-6 weeks.

We want to start on time and end on time in 59 minutes or less.

Be responsible with closure issues. If someone has to drop off the team, encourage them to come to a meeting and let the team know. Thank them for their work, guilt-free.

Ask them to also share with the Care Team Friend or Family about their team status so that the Care Team Friend won’t assume they did something to make this team member drop off.

Avoid direct financial involvement and medical care with CTF. Providing financial resources changes the relationship. (If you’re picking up groceries, clarify in advance how payment will be handled.)

Providing direct medical care such as dispensing medications is beyond the skill of most members. (Could be a liability issue.)

**NOTE:** The Care Team Member Covenant in the Guidebook mentions a one-year commitment. This has changed. Please ask them to correct it. Team Members may rotate off at any time.

- **Review Powerpoint slides** (if you have time)
What is a Care Team?

A group of people organized to provide practical, emotional, and spiritual support to persons with health concerns or other special needs.

Betsy Smith with Ms. B at The Balm of Gilead Center, Cooper Green Hospital.

What Does a Care Team Do?

• Team activities may include:
  – Transportation to the doctor or grocery store.
  – Household or yard chores.
  – Errands, cook or deliver meals, or social outings.
  – Visit, call, or offer caregivers a break.
  – Prayer or communion based on the needs of the person being visited.

Mary Whetsell, a Care Team Coach, with James.

What Does a Care Team Not Do?

• Provide Medical Support, including assistance with medications, or taking the place of any health care professional.

• Provide Direct Financial Support, including giving or loaning money, paying bills out of one’s own funds, etc.

• Share Confidential Matters outside the Team.

Mary Jo with Care Team Member, Susan Haskell

3 models (Basic, Facility, Mission)

Different Ways to Organize

• Basic Model – Focusses on one person/family and meets a variety of needs for that person.

• Mission Model – Focusses on a common need of several persons.

• Facility Model – Focusses on persons in one place (i.e. nursing home, clinic, hospital) and meets some of the needs at that site.
Care Team Advantages

- People get to do what they enjoy doing in helping others
- Maximum time flexibility
- Variety of skills are offered
- Sharing the care
- Built-in support system

Questions about how Care Teams Work?

12:00-12:50 LUNCH

12:50-1:45 Setting Boundaries and Limits as a Care Team Member (Maryanne)

Format: Small Group Exercise / Large Group Discussion

Leader: When you cross a boundary, what are some of the thoughts or feelings you have almost immediately? (anxiety, resentment, frustrated...)
People can ask you to do anything. But you are the one in control of your boundaries (what you want to do and can do).

Remember we have individual and team boundaries. Make major decisions as a team. This is the power and strength of a team.

Refer participants to the Scenarios in the CTO Section of the Guidebook. (Back of the Guidebook, p. 186.)

Following the exercise refer them back to the section called Building in the Guidebook (p. 52) which describes details about leading this particular exercise.

**Next Step: Set Connecting Visit, First Care Team Meeting**

To wrap up the Care Team Orientation, review the main components:
- Offering Emotional Support
- Understanding the Care Team Model
- Setting Boundaries and Limits

Then, you always set the Next Step

- Connect Care Team and Friend
  The Leader of the team will visit our new CTF (Care Team Friend) in today’s training.

- Set the date and time of the next Care Team Meeting

1:45-2:00  **Leaders in Team Development**  (Malcolm)

**Format:**  Small Groups or Large Group (depending on size of group)

**Small Group Discussion**

1. What needs to happen in your setting to initiate the Beginning (Discovery) and Building (Care Team Orientation) sections you’ve experienced this morning?
   - identity needs
   - make initial visits
   - lead Discovery Events
   - invite people to serve on teams
   - teach Care Team Orientation
   - organize Care Team Orientation

2. What role do you see yourself playing so far?
   - Each participant introduces him/herself
   - Name, Congregation/Organization, City, State
   - What needs to happen to initiate the Discovery Process

---

18
(Beginning & Building) in your setting?

- What will your role be in making this happen “back home?”
  So far we have identified part of the Leadership Team.
  Those who...
    Identify needs
    Make initial visits to discuss Care Teams with those in need
    Lead Discovery Events &/or invite people to serve on teams
    Teach Care Team Orientation or help to organize CTO

Large Group:

- What are the ways to get started that you thought of?
- Share some of the ideas
- Help reiterate “Discovery” and “team approach” thinking.
- What is the role that you see yourself in?
- All these roles are part of a Leadership Team

2:00-2:30

Connecting The Care Team And Friend In A Caring Relationship

(Malcolm)

Format: Large Group, Role Play

Briefly, review the morning focused on Beginning & Building.
Remind participants that an initial visit has already taken place, follow-up phone calls to potential members, and orientation of new members has been completed.
Now, we are ready to Connect! (setting or reaffirming expectations of the Care Team Friend/ Family)
Connecting is the process of bringing together the Care Team and the Care Team Friend. It includes:

- **Connecting Visit**
- **First Care Team Meeting**
- **Follow-up with Care Team Friend**

**Connecting Visit (Role Play):**
We join a “connecting visit” in process. Remind participants of the roles being played....

**Do a brief role play of a Connecting Visit with the other consultant or a participant.**

Emphasize the following in your role play visit.

- Personal introductions and sharing about the team.
- Review ways the team may be helpful.
- Clarify the role of the Leader.
- How would you like to meet the other Team Members?
- Talk about next steps.

Questions about this step of the Connecting Visit?
First or Next Care Team Meeting after the Connecting Visit

**CONNECTING**

**Care Team Meeting Agenda Following Connecting Visit**

- New Care Team Friend & needs identified
- What do I see myself doing on the team?
- What is the team able to do?
- Other concerns, ideas for ongoing education
- Next meeting (Date, Time, and Place)

Follow Up with The Care Team Friend

**CONNECTING**

**Follow Up with Care Team Friend**

- Team Leader communicates with Friend about what the team is able to do, and what they cannot do (if any).
- Discuss how the Friend/Family would like to get to know the team.
- Clarify the next step.

Questions about the First Care Team Meeting or Follow Up with Care Team Friend?

2:30--2:40 Stretch Break

**2:40-3:30 The Team’s Work Of Intentional, Ongoing CARING** (Maryanne)

**Format**: Small groups of 4-5.

**Process of Team Building**

Work in your small groups for three minutes.
List as many things as possible that you haven’t liked about church or your organization meetings you’ve attended in the past. What are the things that happened that make you not look forward to going to a meeting. (5 minutes or less)

Debrief in large group, write responses down on blackboard, paper, or type on the computer in Microsoft Word as suggestions are given, and use LCD projector to project the responses on the screen.

The Care Team Meeting is designed to address all of the above concerns!

See PP Slide on Care Team Meeting Tips and highlight a few of them:

- Start on time, end on time.
- Set clear agenda.
- Delegate parts of the meeting.
- Don’t summarize meeting for latecomers.
- Care Team Friend doesn’t attend, usually.
- Get to know one another.
- Learn together.
- Plan together.
- Have fun together.

Overview of Caring - Care Team Meeting (Communicate, Educate, Coordinate!)
We want to experience just a little what it feels like to be listened to in a Care Team Meeting (the Communicate part).

This exercise is OPTIONAL. If you do the previous exercise on team meetings, you may skip this section.

**Format:** Two person exercise. Choose a partner (one-on-one).

- **Listening Exercise (optional if time)**
  Ask each participant to think of a time in his/her life when he/she either received care from others or offered care to someone.
  Ask each participant to find a partner (preferably someone they don’t know).
  The first person begins by sharing his/her story.
  The other person listens.
  The listener cannot talk. Body language, non-verbals are OK.
The first person has 5 minutes to share.
On your mark, get set, go.

The leader asks participants to switch roles after 5 minutes.

As a large group, discuss the feelings and thoughts of this exercise. Was it hard to listen? Did the storytellers feel heard? This exercise can be done as part of “Communicate” in a Care Team Meeting to have everyone involved in reflecting on the experience.

Same guidelines apply to Care Team Member’s communication in a Care Team meeting that apply to a Care Team Friend:

- Help a person feel what they are feeling when they feel it.
- Learn to walk at the same pace emotionally.
- Take on the role of student rather than teacher.

We will practice Educate and Coordinate portion of the Care Team meeting tomorrow.

3:30-3:40 STRETCH BREAK

3:40— 4:00 Supporting: Keeping Your Teams Healthy (Malcolm)

Format: Large Group, Powerpoint Slides

- Review Six Components of Care Team Development
  Helpful Hint: Even though you feel like you’ve repeated yourself, it helps for people to keep hearing the components.

- How do we support the first four components once they are up and running? That’s what the SUPPORTING component is all about.
• Layers of Support offering and receiving Support
  Care Team Members, Care Team Leaders, Leadership Team, CTN...
  Refer to “Supporting” section within Guidebook

**SUPPORTING**

Supporting involves affirming, empowering, and strengthening the life and work of Care Teams.

- The Care Team Leader
- The Care Team Coach
- Forming a Leadership Team
- Partner Relationship with The Care Team Network

See Guidebook, page 71-77

• You can have solo Leaders or co-leaders

**SUPPORTING**

**Care Team Leader / Co-Leaders**

- Coordinate the calendar
- Facilitate Care Team Meetings
- Communicate with Coach and Leadership Team

See Guidebook, page 74

• Coach – not a team member, but a good optional resource for the team

**SUPPORTING**

**Care Team Coach**

- Serve as a resource person to the team.
- Have open relationship with the Care Team Leader.
- Have ongoing contact with the Care Team Friend.

See Guidebook, page 74, 132

• Leadership Team – a Care Team for Care Teams (usually needed after you have 3-4 teams going)
• Partnership Relationship with CTN (Sign up on the CTN web page to become a CTN Partner to receive free resources.)

4:00-4:10 STRETCH BREAK

3:40— 4:00 Networking: (Malcolm)
Role of Care Team Network

Format: Large Group / Powerpoint Slides / CTN web page
NETWORKING

Hosting a Care Team LTC

- LTC can come to your community
- Criteria for LTC Host sites
- CTN commitments
- Sharing the costs
- Budget planning

See Guidebook, page 79-84

NETWORKING

Care Team Network Web site

www.careteam.org

- Submit your stories, training information
- CTN Forum
- Utilize and request resources
- Subscribe all Care Team Members to e-mail newsletter, Team Work

Don’t work in isolation
Don’t reinvent the wheel
We can learn from one another!

4:00 – 4:30 Wrapping Up
(Evaluation
Schedule for LTC II
Circle of Care)
Care Team Leadership Training Conference - LTC II Overview

8:30-9:00  Check-in (Continental Breakfast)

9:00-9:15  Welcome, Purpose, & Overview  (Malcolm)

9:15-9:45  Settings for Care Team Application  (Maryanne)
  - How are we going to Partner together?
  - Large group – Introductions
  - Small groups – Share assessments together
    What do we have in common?
    What are our differences?

9:45-10:15  Your Leadership in Your Setting  (Malcolm)
  - Small Groups
    What are the some of the challenges you face?
    Aware of the challenges, what are the first steps you can take in Care Team Development?
  - Large Group – Identify key leadership issues.

10:15-10:30  Break

10:30-11:25  Beginning through experience  (Malcolm)

11:25-11:35  Break

11:35-12:30  Building through experience  (Maryanne)

12:30 -1:15  Lunch

1:15 - 2:15  Connecting through experience  (Malcolm)

2:15 - 2:30  Break

2:30 - 3:30  Caring  (Maryanne)
  Large Group Role Play

3:30 - 4:15  Supporting and Networking  (Malcolm)
• The Leadership Team:
  Support for Care Team Development
  Ongoing support to all existing teams
• Partnership & CTN Resources
• Affirmations

4:15 - 4:30  Closing  (Malcolm)

• Evaluations
• Circle of Care
LTC II TEACHING PLAN

8:30-9:00  Check-in (Continental Breakfast)

9:00-9:15 Welcome (Malcolm)

Welcome to the Care Team Leadership Training Conference (Day Two)

Format: Large Group

Objectives
- Explore strengths and challenges of each setting,
- Practice introducing the team approach to others and training Care Team Members,
- Learn how to develop a Leadership Team to help all participants have the local support they need following the conference.

Go over Objectives.

Today is a different pace.
Today is about practicing.
We can’t wait until it’s perfected. Just get started.
Today is a safe environment.
Today is an opportunity to incorporate, to begin to think and talk, Care Teams.
What are the strengths of your setting?
What are the challenges?
We will practice the process of introducing Care Teams, equipping teams to serve, connecting CTFs and teams.
We will discuss developing Leadership Teams.
The Leadership Teams is the Care Team for Care Teams.

Building a Leadership Team

- Begin with Discovery
- Invite Leaders, Coaches to collaborate
- Different Roles will be needed

It should be developed just like a Care Team – from discovery - allowing people to learn about opportunities and see where they are called. This is different than forming a committee that is appointed. This is from the ground up.

A Leadership Team may begin with 2-3 persons who have attended an LTC. As you begin the discovery process, consider all the opportunities for participants … Care Team members, Care Team Leaders, members of the Leadership Team.

Why are we doing this?

**Human need** is the foundation for Care Teams. This conference is intended to be specific about the **process of involving people who care in responding to this need**. You are concerned about people with health concerns and through your **leadership you have the ability to make a difference**. You are the leaders in this process called Care Team development which involves working together to share the care.
**Large group**—facilitate a discussion asking participants to share one concept that they remember from yesterday about Care Teams (related to Beginning, Building, Connecting, Caring, Supporting or Networking).

Facilitator helps synthesize messages. Translate into Care Team principles if possible. The purpose is to freshen their memory about what they learned yesterday.

![Diagram of Care Team Network]

**9:15-9:45** **Settings for Care Team Application**  
(Maryanne)

**Small groups** (4-5) — Using “Assessment” document (on reverse of participant agenda), share your present setting for developing Care Teams. Highlight for a couple of minutes each what you want to share about your setting or inventory so that others understand their context. Focus on the first four questions of the Assessment. They do not have to write down their responses, just share in the small group.

What do we have in common in our groups?

What are our differences?

- Large group—How many of us are from congregations--Small, Medium, Large? Organizations-Types and the mission? Common themes discovered?

**9:45-10:15** **Your Leadership in Your Setting**  
(Malcolm)

**Format:** Large Group Facilitator, Table Discussions.

5 min - You plus hopefully one or two others are the basic leadership in your setting. You are concerned about Care Team development and willing to give leadership to the initiation or expansion of this development in your setting. We know you will have challenges.

Helpful hint: Share a personal challenge you have faced in your setting and how you responded to it. (For example, potential conflict with an existing caregiving program in the church that fells threatened by this new concept.)
What are some of the challenges you face?
For example, an unwillingness of people to accept help; absence of support from staff; a projects/tasks/volunteers mentality; reluctance of persons to commit to team meetings.)

5 min. – Table Groups brainstorm (don’t try to solve) additional challenges

5 min. – Reports from Table Groups

2 min. – Summary of Questions 1 (“So, there are challenges!” or “So, no challenges, wide open setting!”)

Aware of these challenges, what are the first steps you can take in Care Team development?

8 min. – Table Groups brainstorm “first steps to getting started or taking the next step” given these challenges

8 min. – Reports from Table Groups

2 min. – As you, plus one or more others, address these two questions, you have begun the process of building a Leadership Team. Then, as you do Care Team development (Discovery, Building, Connecting, Caring), be alert to LEADERSHIP NEEDS, and intentionally identify persons who may respond to those needs. Then, don’t recruit, INVITE! In this way, you continue to build a Leadership Team.

10:15-10:30 Break

10:30-11:25 Beginning (Malcolm)

Format: Large Group Intro, Table Group Practice

• Introduction to Experiential Leadership

Yesterday we spent time learning about the fundamentals of developing Care Teams.

Today we will spend time applying the Care Team model to our own personal settings.

We will practice “thinking and talking Care Teams.”

This is a safe learning ground.
• **Beginning**

Use Powerpoint Slides to review Beginning

**Process of Team Building**

- **BEGINNING**
  - Persons Needing Care
  - A Team Approach
  - Persons Who Care

**Discovery**

- Discovery can be with existing groups or with individuals
- Discover Potential Care Team Friends
- Discover Who Wants to Care (what I love to do)
- Discover how Care Teams Work

Guideline, page 27

**Distribute Handout for Beginning**

Each table member will:

- identify a leadership role that he/ she will “practice” at the table, (choose from examples provided or select something else) (1-2 minutes)

- survey “how to” material in Guidebook, each person putting it in the context of the back-home setting (3 minutes)

- decide how some specific part of it could be presented; assign other participants to their role (5 minutes)

- practice / role play in **present** tense! (Others help the speaker stay in present tense.) (4-5 minutes/ person)
• receive feedback from other group members
  You did .... really well.
  You might want to add...
  (2 minutes/ person)

• Remind members that this is a safe environment!
  This is the time to learn and to make mistakes.

• **Practice Groups for Beginning**

  **Helpful Hint:** Assign a staff member to sit-in on this first round to get people on the right track. Keep them in the present tense!

• **Large Group - Key Issues.** Facilitator helps to process.

  What does it feel like now as you think about Beginning after these exercises?

  (Moves people from listening to doing. Start in an environment at home that is also comfortable. Allow yourself to stumble. Let’s you learn from others.)

  Refer to key points on PP slides.

• **Questions about Beginning**

  **11:25-11:35 Stretch break**

  **11:35-12:30 Building** *(Maryanne)*

  (SEE HANDOUT, END OF THIS SECTION ENTITLED “BUILDING”)*
Format: Large Group Intro, Table Group Practice

- **Overview** - use PowerPoint slide

BUILDING

Building is about preparing your team through Care Team Orientation!
- Offering Emotional Support
- Understanding the Care Team Model
- Setting Boundaries and Limits

- **Practice Groups**

  See Building Handout for topics

- **Large Group:**

  Did you begin to feel more comfortable with the material?

  What questions do you have about organizing and leading Care Team Orientation?

  **Key Issues**

  Be flexible.

  Offer orientation at time that is convenient for future members.

  Consider options – 1 – 3hr time or 3 – 1hr times.

12:30 - 1:15 Lunch

1:15 - 2:15 **Connecting** (Malcolm)

  **Format:** Large Group Intro, Table Group Scenarios

  - **Overview** - use PowerPoint slide
Scenarios

See Connecting Scenarios.

Using attached scenarios, four participants at each table are assigned one scenario where they serve in the role of the Care Team Leader or a member of the Leadership Team. The fifth participant (the best actor in the group) serves as the Care Team Friend for each scenario.

- Large Group: Key Issue(s) & Questions.

2:15 - 2:30 Break
The main goal of this section is to help participants know how to teach others about running an effective Care Team meeting. The more interactive and experiential teaching style you use the better. The difference with this section is we want the groups or teams to teach the WHOLE group rather than one another.

PRACTICE TEACHING TO LARGE GROUP

Format: Small Group Preparation, Large Group Presentation

Overview: Understanding the material in the Caring Section of the Guidebook. (see “Caring” handout for list of tasks we will practice)

I am going to assign one of the following tasks to each table. You will have ten minutes to plan how to teach this concept to the larger group.

One person, or everyone at the table, may be involved in teaching the larger group. Each presentation will be four minutes or less. Feel free to add other points not covered in the Guidebook.
• Give a brief overview (not detailed explanation) of the three components of a Care Team meeting and why they are important (p.61);

• Explain the purpose of “Communicate” in a Care Team meeting. Demonstrate or give examples of how to do it (p. 62, 123).

• Explain the purpose of “Educate” in a Care Team meeting. Demonstrate or give examples of how to do it (p. 62-63).

• Explain how one does the “Coordinate” section in a Care Team meeting. Demonstrate or give examples of how to do it (p. 63, 117).

• How can we identify each Care Team Member’s time, gifts, and interests when a team begins (p. 64-65)?

• What is an “Annual Covenant Renewal” for a team and why could it be helpful? Even though a one-year commitment is no longer required, why would reassessment of the situation be good for everyone involved?

• How could resources on the Care Team Network’s Web site or on the internet in general be helpful to Care Team members? How could e-mail and the phone be used to enhance the work of a team? Be creative. (p. 126)

• Teach the larger group the first five tips for visiting persons who are ill (p. 120). Be creative in how you present it. Or teach the group how NOT to make visits.

• Teach the larger group tips six through ten for visiting persons who are ill (p. 121-122). Be creative in how you present it. Or teach the group how NOT to make visits.

• What is a Contact Record Sheet and how could it be used to help the team function in healthy ways instead of being “just another report?” (p. 118)
3:30 – 4:15 Supporting and Networking  
(Malcolm)

Format: Large Group, PP slides

Process of Team Building

BEGINNING
(Discovery)

CARING
(Preparing the Team's Work)

BUILDING
(Preparing a Team)

CONNECTING
(Linking a Team with a Need)

Supporting – Maintaining Healthy Teams

SUPPORTING
Supporting is all about sustaining Teams!

- Care Team Leader
- The Leadership Team
- CTN Role in Partnership
- CTN Resources
  - LTC I and II—send more persons
  - Guidebook—download from Web site
  - Web site—Resources, Information

See Guidebook, page 71-77

• The Leadership Team:

  Support for Care Team Development
  Ongoing support to all existing teams

• Partnership:

  CTN Role in partnership:

  Train and support Leaders in Care Team Development

• CTN Resources:

  LTC I & II
  Guidebooks
  CTN Web site
  LTC II Web page
Ongoing development of new resources

NETWORKING

Networking is all about partnership!

- Submit your stories, training information
- CTN Forum
- Utilize and request resources
- Subscribe all Care Team Members to e-mail newsletter, Team Work

• Affirmations to support one another (OPTIONAL)

  Acknowledge the contributions, strengths, and gifts of each person in your small group.

  (Handout “affirmation notes” to each person. Music)

  Each person should have a paper with their first name.

  Pass the paper to the person on your right.

  Write a word, phrase, or sentence about what you have learned or gained from that person today.

  When the paper gets back to the owner, he/she must write something affirming to him/herself.

  Role model creative ways to support the contributions of all involved.

4:15 - 4:30 Closing (Malcolm)

Evaluations and Circle of Care
Assessment of Your Setting

Describe the setting in which you are, or hope to, develop Care Teams. (type of setting, mission, size, perceived support from staff and membership, etc.)

How do you hope to utilize Care Teams in your setting? What type of needs are you wanting to address initially?

Describe at least three strengths of your setting. (existing outreach programs, active membership, mission-focused, etc.)

What are your long-term “hopes and dreams” for developing Care Teams?

What challenges have you experienced / do you anticipate?

Aware of the challenges, what are the next steps you can take in Care Team development?
Choose one of the roles / tasks listed below.
Design how you want to present it (Survey the material in the Guidebook for resources)
Practice your segment (4-6 minutes) in the present tense
Provide feedback (What did the person do really well? What suggestions would be helpful?)

1. Explain to a person at your table the purpose of a visit with a potential Care Team Friend and how one decides who the best person is to make the visit. Teach them about the first three steps of “How to Discover the Needs of a Potential Care Team Friend” (see pages 28-29).

2. Explain what a Care Team is to a potential Care Team Friend (CTF) and mention some of its limitations. Respond to spontaneous questions the Care Team Friend asks about Care Teams and how they work (anyone at your table can play the part of a potential CTF). (see page 29.)

3. Describe what a Discovery Event is to a staff member of your congregation or organization and how it is different from recruiting volunteers. (See “What Is a Discovery Event?” page 31.) Name at least three different groups in your setting that could be open to a Care Team Discovery Event and how your presentation might be slightly different in a couple of them (i.e. time vary, certain parts emphasized more, etc.).

4. Lead the part of a Discovery Event that helps participants “Identify Persons Who Need Care” and list some of the needs that these persons might have. (See bottom of page 33 and 34.)

5. Lead the part of a Discovery Event that helps persons identify what they enjoy doing in helping others and how that could be used in a team approach (See “Understanding the Team Approach,” pages 34-35).

6. As a table, talk about how you can give people an opportunity to care using the Exploration Form (p.85) and why it is important to use it or something like it at the end of a Discovery Event, what “Next Steps” to announce, and what to do following a Discovery Event (bottom of page 35 and 36.)

7. Describe how you would start building a Leadership Team in your setting (see “The Beginning of a Leadership Team, bottom of page 36 and 37).
BUILDING
(pages 38-55)

Choose one of the roles / tasks listed below

Design how you want to present it (Survey the material in the Guidebook for resources)

Practice your segment (4-6 minutes) in the present tense
(i.e., don’t talk about what you plan to do, just do it in your group!)

Provide feedback (What did the person do really well? What suggestions would be helpful?)

Examples of Leadership Roles/ tasks related to Building

1. Describe the purpose of Care Team Orientation and its three basic topics or components. Give a brief purpose of why you think these components are included or why they would be helpful to a new team. (page 39)

2. Define the role of the Team Leader (See “Selecting a Care Team Leader, bottom of page 38,” and “Care Team Leader Job Description” page 179.)

3. Explain and lead a discussion on the Care Team Member Covenant in a Care Team Orientation. (see page 44)

4. What kind of support does a Care Team offer and what are some of its limitations? (“What is a Care Team and What a Care Team Is Not,” See bottom of page 41).

5. What is the purpose of the paper exercise in “Offering Emotional Support” (See “Explain Purpose to Participants”)? What are some things to be cautious about and other things to keep in mind as you would lead this exercise? (see page 45)

6. Lead Round One discussion of the Emotional Support exercise at your table, make the main point of this round (see pages 47-48).

7. Lead Round Two discussion of the Emotional Support exercise at your table, make the main point of this round (see page 48).

8. Lead Round Three discussion of the Emotional Support exercise at your table, make the main point of this round (see pages 48-49).

9. Explain to another person on your Leadership Team how to teach a Care Team about “Setting Boundaries and Limits” in Care Team Orientation (p. 51)
CONNECTING

- Four participants choose one scenario each
- One participant serves as Care Team Friend/potential Friend for all scenarios
- Review your scenario
- Role Play your segment (4-6 minutes)
- Provide feedback (What did the person do really well? What suggestions would be helpful?)

Scenarios related to Connecting

1. You are making a Connecting Visit with the new Care Team Leader and the Care Team Friend, who is an elderly member of the congregation. She has been very active throughout her 25-year membership with the church and is still somewhat reluctant about asking for help and identifying needs for her church members. She is unable to drive and still lives in her home. **How can you assist her during this connection process to help her feel more comfortable with accepting help?**

2. As the Care Team Leader you go to meet your new Care Team Friend with another team member who knows the Friend well. The team member initially introduced the Care Team concept to the Care Team Friend as he/she already had a good relationship. With good intentions in mind, the team member initially over-promised how a Care Team might be able to help. The new Friend now has a list of many things with which they need help. **How do you help clarify with the Friend so you can start off with realistic expectations? What conversation might you have with the team member prior to the visit?**

3. As one of the co-leaders of a team who will be serving a small nursing home, you are going to meet with the Activities Director now that the team is formed and ready to get started. As this is the primary staff member with whom the team will work, you want to establish good communication with him/her. The team plans to coordinate monthly birthday parties for the residents as well as visit with residents twice per week. **Discuss with the Activities Director of how the team plans to coordinate their work.**

4. Your congregation is building a Care Team for one of the clients of Middle Alabama AAA (the local organization serving senior citizens) who lives in the community. You and a member of the agency staff go to visit the new Care Team Friend. Share with the Friend about the team... how many members are on the team, how the Friend will communicate with the team, etc. Clarify the role of the agency versus the role of team. Find out how the Friend would like to meet the rest of the team.
CARING

**Leader:** Assigns one of the following tasks to each table. As a table, you will have ten minutes to plan how to teach this concept to the larger group. Each presentation will be five minutes or less. Feel free to add other points not covered in the Guidebook.

1. Give a brief overview (not detailed explanation) of the three components of a Care Team meeting and why they are important (p.61);

2. Explain the purpose of “Communicate” in a Care Team meeting. Demonstrate or give examples of how to do it (p. 62, 123).

3. Explain the purpose of “Educate” in a Care Team meeting. Demonstrate or give examples of how to do it (p. 62-63).

4. Explain how one does the “Coordinate” section in a Care Team meeting. Demonstrate or give examples of how to do it (p. 63, 117).

5. How can we identify each Care Team Member’s time, gifts, and interests when a team begins (p. 64-65)?

6. What is an “Annual Covenant Renewal” for a team and why could it be helpful? Even though a one-year commitment is no longer required, why would reassessment of the situation be good for everyone involved?

7. How could resources on the Care Team Network’s Web site or on the internet in general be helpful to Care Team members? How could e-mail and the phone be used to enhance the work of a team? Be creative. (p. 126)

8. Teach the larger group the first five tips for visiting persons who are ill (p. 120). Be creative in how you present it. Or teach the group how NOT to make visits.

9. Teach the larger group tips six through ten for visiting persons who are ill (p. 121-122). Be creative in how you present it. Or teach the group how NOT to make visits.

10. What is a Contact Record Sheet and how could it be used to help the team function in healthy ways instead of being “just another report?” (p. 118)