

# Structure referral pathways, communications, and follow-ups with community providers

## The challenge

Districts working with community mental health providers might need support with:

- Managing referrals in a way that directs students to the right services at the right time.
- Ensuring streamlined communications between the school or district, community providers, and parents or guardians.
- Assessing whether support services are meeting student needs.

## Purpose of this Promising Practice

This Promising Practice includes:

- A resource for [understanding and addressing potential barriers to working with community providers](#).
- A guide for a working session on [assigning roles and responsibilities to school or district staff and community providers](#).
- A sample handout and metrics for [reviewing data with community providers](#).
- A sample [calendar of meetings with community providers](#).
- A sample checklist for [periodically assessing how effectively your district is managing the relationship with community providers](#).

After completing these exercises, **you will have a roadmap for action** that may strengthen collaboration with community providers.

**Your next step could be to adapt these tools to your context.** Consider reviewing the Chiefs for Change [Implementation Engine](#) for suggestions and resources to support execution.

## Who might use this Promising Practice, and when?

This Promising Practice is designed for school or district staff responsible for establishing and maintaining relationships with community mental health providers (e.g., district heads of student support and community partnership coordinators) and can be used at any time in the school year.

# Understand and address potential barriers to working with community providers

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## Who is this tool for?

This tool is designed for school and district staff responsible for establishing and maintaining relationships with community health organizations or other external entities that provide student mental health services.

Example roles include district heads of student support, members of district student support teams, and community partnership coordinators.



## Steps for using this tool (*supporting materials follow*):

1. Review the potential solutions to common challenges and plan action.
2. As your district works to understand barriers to partnering with community providers, you might find it helpful to solicit staff input. This tool includes an example survey for gathering feedback from staff. If your district chooses to administer the survey, your team should:
  - a. Review and adapt the sample survey questions.
  - b. Determine who will participate in the survey and collect responses.
  - c. Review the survey results.
3. Identify next steps.

## OBJECTIVE 1

### Identify barriers to working with community providers and select potential actions your district could take to address them

#### Instructions:

- Review these common barriers to working with community providers. Which ones present the biggest challenges to your district? Are there any missing from the list that you would add?
- Review the potential actions districts can take to address these challenges.
- Select any actions your district might consider taking to further address these challenges.

<b>Common challenges</b> <i>Select challenges relevant to your district</i>	<b>Potential mitigation actions</b> <i>Select actions your district might consider</i>
<ul style="list-style-type: none"><li><input type="checkbox"/> District leaders and staff are unsure how to effectively manage data privacy and confidentiality while collaborating with community providers (e.g., ensuring the Health Insurance Portability and Accountability Act (HIPAA) and Family Educational Rights and Privacy Act (FERPA) are upheld in addition to specific state or local rules and regulations).</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Work with your district legal team and state department of education to ensure you are aware of all relevant federal, state, and local rules and regulations governing confidentiality, data privacy, and consent. At the federal level, there are several helpful resources you might review as a starting point, including:<ul style="list-style-type: none"><li>• <a href="#">Overview of FERPA and HIPAA</a></li><li>• <a href="#">Understand how HIPAA and FERPA apply to student health records</a></li><li>• <a href="#">Comparison of HIPAA and FERPA laws and details on state-level laws for select states (Hawaii, California, Nevada, and Arizona)</a></li></ul></li><li><input type="checkbox"/> In consultation with your district legal team, ensure all arrangements with community providers are set up to fully comply with all relevant requirements (e.g., including data-sharing agreements and communications processes).</li><li><input type="checkbox"/> Work with your district legal team to ensure all teachers, staff, and relevant community providers are aware of their role requirements.</li><li><input type="checkbox"/> Other [please specify]</li></ul>

<b>Common challenges</b> <i>Select challenges relevant to your district</i>	<b>Potential mitigation actions</b> <i>Select actions your district might consider</i>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Too many staff members and partners are trying to engage families, collect consent, and gather paperwork.</li> <li><input type="checkbox"/> There is a lack of clarity on how to connect students with outside resources and who to go to with questions about supporting students who are receiving care.</li> <li><input type="checkbox"/> On occasion, there is no owner for key activities, such as helping partners understand school or district policies and procedures and facilitating two-way communication between school or district staff and partners.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Assign roles and responsibilities to school or district staff and community providers</a></li> <li><input type="checkbox"/> Other [please specify]</li> </ul>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Partners and schools or districts are separately collecting data on student wellbeing, but not collaborating toward shared goals.</li> <li><input type="checkbox"/> Schools or districts are referring students to mental health provider partners, but do not know if those services are improving outcomes for students and families.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Regularly review data with community providers</a></li> <li><input type="checkbox"/> Other [please specify]</li> </ul>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Students receive services inconsistently as goals that may have been set at the beginning of the partnership get lost over time.</li> <li><input type="checkbox"/> When student wellbeing challenges come up or changes need to be made to strengthen services, there is no clear way to discuss the challenges and plan of action.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Establish a meeting calendar with community providers</a></li> <li><input type="checkbox"/> Other [please specify]</li> </ul>
<ul style="list-style-type: none"> <li><input type="checkbox"/> It is difficult to track whether processes and practices for working with community providers are implemented at all schools throughout the school year.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Periodically assess how effectively your district is managing its relationship with community providers</a></li> <li><input type="checkbox"/> Other [please specify]</li> </ul>

## OBJECTIVE 2

### If needed, gather feedback from staff on barriers to working with community providers

If you are unsure of the biggest barriers your district faces when working with community providers, you might find it helpful to solicit staff input. Below is an example of how you might use a survey to solicit that input.

- Step 1: Review and adapt the sample survey questions.
- Step 2: Determine who will participate in the survey.
- Step 3: Review the survey results and determine the next steps.

Note that while these resources are focused on surveying staff, you may also wish to gather perspectives from families and students.

#### Step 1: Review and adapt the sample survey questions

**Instructions:** Review the example survey below and consider adapting the sample or creating your own. The example below is also available as a Google form. To make a copy of the form for your own use, please:

- Click on this [link](#).
- Then, click “Make a Copy.”

*Please monitor who your copy of the survey is shared with to ensure it is only shared with the staff who should be able to view the responses.*

Dear staff,

Date: \_\_\_\_\_

The \_\_\_\_\_ School District is evaluating our collaboration with community health organizations and other external partners who provide mental health services to our students.

We are interested in your opinions. Please fill out this questionnaire and return it to the student support office by \_\_\_\_\_. As a reminder, please do **not** share any information regarding specific students in your responses. Thank you for your participation.

**Reflect on how school staff and community mental health providers currently work together. Consider work norms, sustainability, and processes.**

1. What is working well?
2. What could be improved? How does it affect students and staff?

**Reflect on how roles and responsibilities among school staff and community mental health providers are assigned.**

3. What is working with our current roles and responsibilities?
4. What is not working well? How does this affect students and staff?

**Do you have any additional suggestions?**

## Step 2: Determine who will participate in the survey

**Instructions:** Write down the names of staff who will complete the survey. Consider examining your list with the following questions in mind:

- Do I have participants who regularly collaborate with community health organizations and other external partners on student mental health?
- Do these participants reflect the diversity of my district (e.g., grade levels and schools served, social and economic demographics, key stakeholder groups)?

Then distribute the survey to participants and give them instructions on how and when to return their answers.

Potential role to include	Name of survey participant
School head(s) of student support	
School counselor(s)	
Social worker(s)	
School psychologist(s)	
Other licensed provider(s) (e.g., licensed clinical social workers)	

**Note:** While this resource is focused on surveying staff, you may also wish to gather feedback from families and students on what the collaboration and experience feels like from their perspectives.

### Step 3: Review the survey results and determine the next steps

**Instructions:** Read the survey responses and consider the following questions to guide your reflection.

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Where might there be opportunities to improve collaboration with community health organizations or other external partners that provide student mental health services?

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What may not have been captured in the survey responses but is valuable to focus on or consider?

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What is the district already doing that needs to be formalized or scaled up to reach all schools?	What new initiatives could the district consider launching?	What priorities does the survey suggest the district should focus on first?
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## OBJECTIVE 3

### Identify potential next steps

<b>Task</b> <i>What does your district need to do next?</i>	<b>Owner</b> <i>Who will be in charge of making sure this task is complete?</i>	<b>Deadline</b> <i>When will this task be complete?</i>
<i>Example: Clearly assign and communicate roles and responsibilities to school or district staff and community providers</i>	<i>Community partnership coordinator</i>	<i>Beginning of next semester</i>



# Assign roles and responsibilities to school or district staff and community providers



## Who is this tool for?

This tool is designed for school and district staff responsible for establishing and maintaining relationships with community health organizations or other external partners who provide student mental health services.

Example roles include district heads of student support, members of district student support teams, and community partnership coordinators.



## Steps for using this tool (*supporting materials follow*):

1. Identify a team to plan the roles and responsibilities for school-based mental health services during the working session.
2. Personally invite the team to the working session and schedule the working session.
3. Prepare an agenda and share it with the team.
4. Prepare and print materials for the working session.
5. Facilitate the working session.
6. Identify next steps, including working with district legal and community providers to renegotiate existing memorandums of understanding (MOUs) or create new ones, where appropriate.
7. Communicate roles and responsibilities to school and district staff, community providers, and other key stakeholders.

**Consider at which stages of the process your team might involve the district's legal and procurement teams.**

**Consider whether relevant stakeholder groups that are not represented in the working session might be consulted to get a better understanding of how current roles and responsibilities are working (e.g., through a survey or focus group).**

## OBJECTIVE 1

### Identify a team to plan the roles and responsibilities for school-based mental health services

**Instructions:** Use the table below to list meeting attendees who will serve as representatives for each role. As you develop this team, please try to reflect the diversity of key stakeholder groups (e.g., types of roles, grade levels, and schools).

Consider examining your list with the following questions in mind:

- Who in my district knows our community mental health providers' current responsibilities?
- Who in my district knows what roles teachers, staff, and administrators play in student mental health services?
- Who in my district understands the systems and processes for connecting students to mental health services, including how systems differ across schools?

Potential role	Name of meeting attendee
District head(s) of student support	
School head(s) of student support	
Other administrator(s) (e.g., principal)	

## OBJECTIVE 2

### Prepare an agenda and share it with the team

**Instructions:** Adapt the email and agenda. Consider splitting the work into a series of meetings, as needed.

Dear colleagues,

I am looking forward to our working session on [date] at [time]. We will be meeting at [location].

The district has set a goal to increase our students' access to high-quality mental health services by strengthening our collaboration with the community providers of these services.

During our working session, we will further define the roles and responsibilities of our staff and community mental health providers. Please see the agenda below.

Let me know if you have any questions. I look forward to working with you on this important topic.

[Signature]

#### Agenda

Topic	Time
Meeting goals and introduction	5 minutes
Identify a central coordinating role to act as a liaison between school staff, community mental health providers, students, and families	30 minutes
Break	5 minutes
Plan roles and responsibilities for teachers, staff, administrators, and community mental health providers	35 minutes
Identify next steps and begin taking action	15 minutes

## OBJECTIVE 3

### Prepare and print materials for the working session

Before the meeting, consider preparing the linked materials for the working session.

- [Participant workbook](#)
- [Sample job description for a resource coordinator](#)

**OBJECTIVE 4****Facilitate the working session****Agenda topic: Meeting goals and introduction**

**Facilitator:** Consider setting goals for the meeting at the beginning of the working session. You could edit the sample goal below or draft your own. Consider asking the group if they have questions about the goal(s) or want to add additional goals.

The purpose of this meeting is to further define the roles and responsibilities of our staff and community mental health providers. By doing this, we want to enable our district to increase our students' access to high-quality mental health services and strengthen our collaboration with the community providers of these services.

**Facilitator:** Before the next agenda topic, consider allowing the team to share their reflections on how relationships with mental health providers are currently managed. If you surveyed staff, you might also consider summarizing the results in addition to sharing your own reflections.

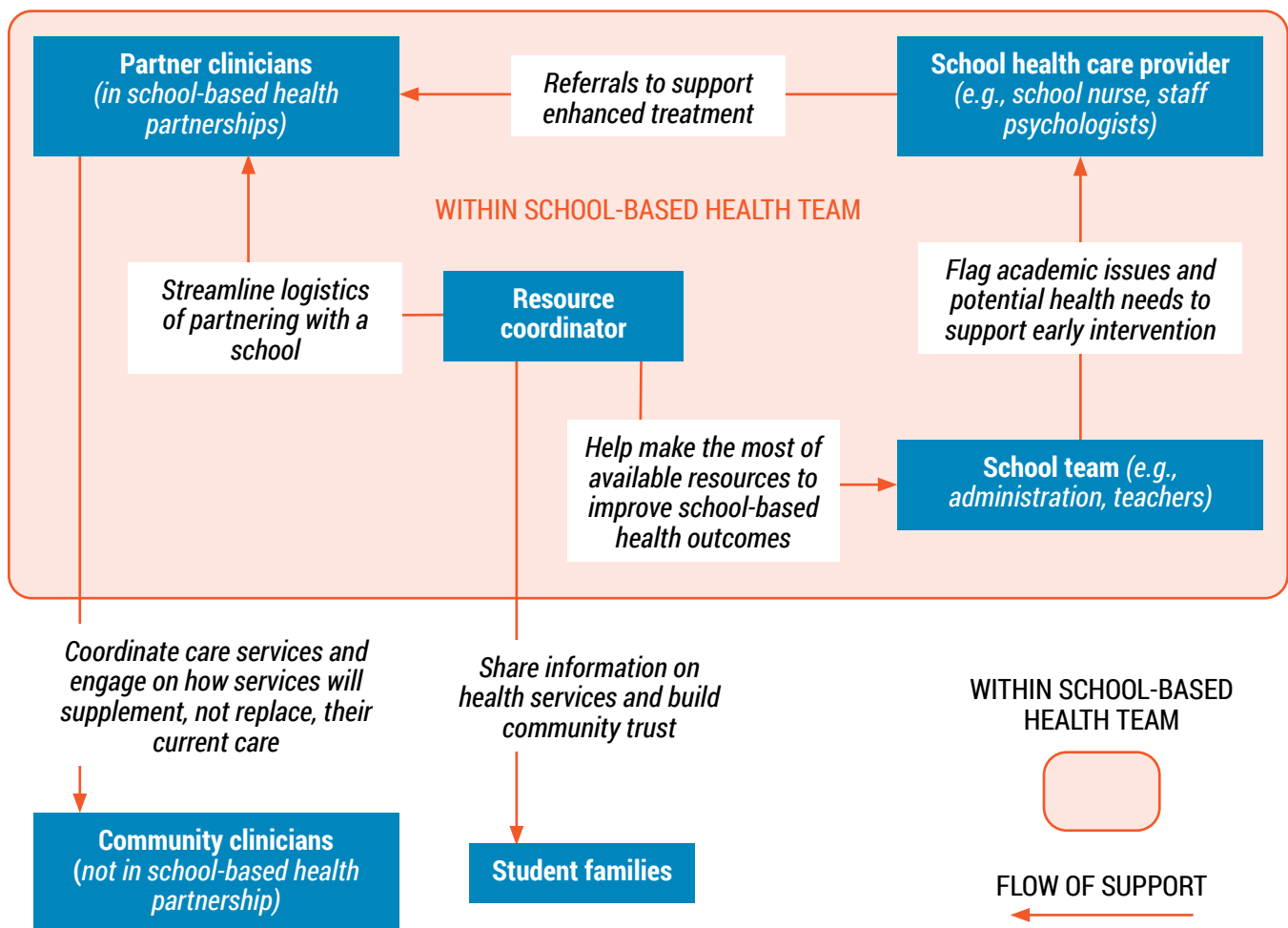
## Agenda topic: Consider identifying a central coordinating role to act as a liaison between school staff, community mental health providers, students, and families

**Facilitator:** Review the resource coordinator role and [job description](#) with your team. Determine whether to define a school-based resource coordinator within the district, considering how many students each resource coordinator can support. For example, depending on student needs and resource availability, one resource coordinator may be able to support multiple schools.

The [School-Based Health Care Support Toolkit](#) (Ohio Department of Education) highlights the **importance of a central coordinating role, such as a resource coordinator**. A person in this role may be able to support schools in making the most of partnerships, while **building awareness and trust in services for students, staff, and families**.

### Key roles in school-based health efforts and how they support each other

(image adapted from the Ohio Department of Education)



Does your school or district have a similar coordinating role? If not, who currently does the work of a resource coordinator?

List the staff who currently do the work of a resource coordinator	What tasks do these staff do?	For districts, does this role exist at all schools?
		<input type="checkbox"/> All schools <input type="checkbox"/> Most schools <input type="checkbox"/> Some schools <input type="checkbox"/> Not sure/don't know
		<input type="checkbox"/> All schools <input type="checkbox"/> Most schools <input type="checkbox"/> Some schools <input type="checkbox"/> Not sure/don't know
		<input type="checkbox"/> All schools <input type="checkbox"/> Most schools <input type="checkbox"/> Some schools <input type="checkbox"/> Not sure/don't know

If the work is not currently done or is split between several professionals in different departments, consider whether to define a school-based resource coordinator within the district.

## Agenda topic: Plan roles and responsibilities for teachers, staff, administrators, and community mental health providers

**Facilitator:** Review the potential roles and responsibilities with your team. Then, plan the roles and responsibilities for your district.

Review the sample roles and responsibilities and adapt them for your district. Consider which roles exist in your district and which tasks or responsibilities are needed in your context.

Possible roles	Potential school-based mental health responsibilities
<b>Administrators and principals</b>	<p>Make key operational decisions and get buy-in from all internal and external stakeholders.</p> <ul style="list-style-type: none"> <li>• Organize resources needed to launch mental health services (e.g., physical space, technology, and transportation).</li> <li>• Work with the resource coordinator and partner clinicians to build systems, guidelines, and processes for delivering mental health care (e.g., guidelines for delivering services on campus and guidelines for referrals to off-campus services).</li> <li>• Work with district leaders, including the legal department and resource coordinator, to ensure policies are in place to uphold and protect student and family rights, privacy, and confidentiality.</li> <li>• Ensure partner clinicians are integrated with the school staff (e.g., by inviting them to staff events and providing a forum for questions).</li> </ul>
<b>Resource coordinator</b>	<p>Serve as a day-to-day liaison among school leaders, staff, community providers, and the greater community.</p> <ul style="list-style-type: none"> <li>• Coordinate policies and procedures related to mental health, including consent and release to receive services, and logistics for connecting students and families to additional resources (e.g., insurance and wraparound services).</li> <li>• Ensure community providers and school staff know, understand, and consistently follow policies and guidelines designed to protect student and family rights, privacy, and confidentiality.</li> <li>• Provide mental health services information to students, families, the community (e.g., at back-to-school nights and health fairs), teachers, and other school staff (e.g., new teacher orientation).</li> <li>• Support efforts to increase model sustainability (e.g., track performance outcomes and collaborate with teams to improve mental health programs).</li> </ul>
<b>School mental health support staff</b>	<ul style="list-style-type: none"> <li>• Perform an initial triage and, as needed, refer cases for outside care.</li> <li>• Work with community providers and partners to ensure treatment compliance (e.g. medication administration) and follow-up care for students with chronic conditions.</li> </ul>



Possible roles	Potential school-based mental health responsibilities
<b>Community providers</b>	<ul style="list-style-type: none"> <li>• Administer treatment to students with necessary family consent, making additional referrals to other providers where necessary.</li> <li>• Partner with other community clinicians to ensure coordination of care across providers.</li> <li>• Lead sessions for families, teachers, and the community to share the services.</li> <li>• If delivering care in the school environment, treat students as they would be treated in a traditional health clinic, while remaining conscious of the key differences in caring for students in a school environment. (Providers can use <a href="#">this toolkit</a> for guidelines on working at schools.)</li> </ul>
<b>Teachers</b>	<p>Serve as trusted partners for community providers, school mental health support staff, and the resource coordinator to relay relevant academic information and support early intervention (e.g., referring students for assessment and support, sharing observations with providers).</p> <ul style="list-style-type: none"> <li>• Share relevant health and academic observations through the relevant referral systems (e.g., discuss student challenges with school health care providers).</li> <li>• Work with clinicians to ensure school-based mental health efforts are minimally disruptive to the classroom (e.g., when it is crucial to have students in class and how to pull students out of class).</li> </ul>

Source: Adapted from the [School-Based Health Care Support Toolkit](#) (Ohio Department of Education)



## Agenda topic: Identify next steps and begin taking action

**Facilitator:** *With the team, determine what needs to happen next. If there is time, consider starting work on the tasks before the end of the meeting.*

*Potential tasks could include: (1) work with the district’s legal department and community providers to update or refine existing MOUs or create new ones, where appropriate; (2) communicate roles and responsibilities with school or district staff, community providers, and other key stakeholders; and (3) once roles and responsibilities have been established, follow up with district staff and partners on how systems are working and make changes as needed.*

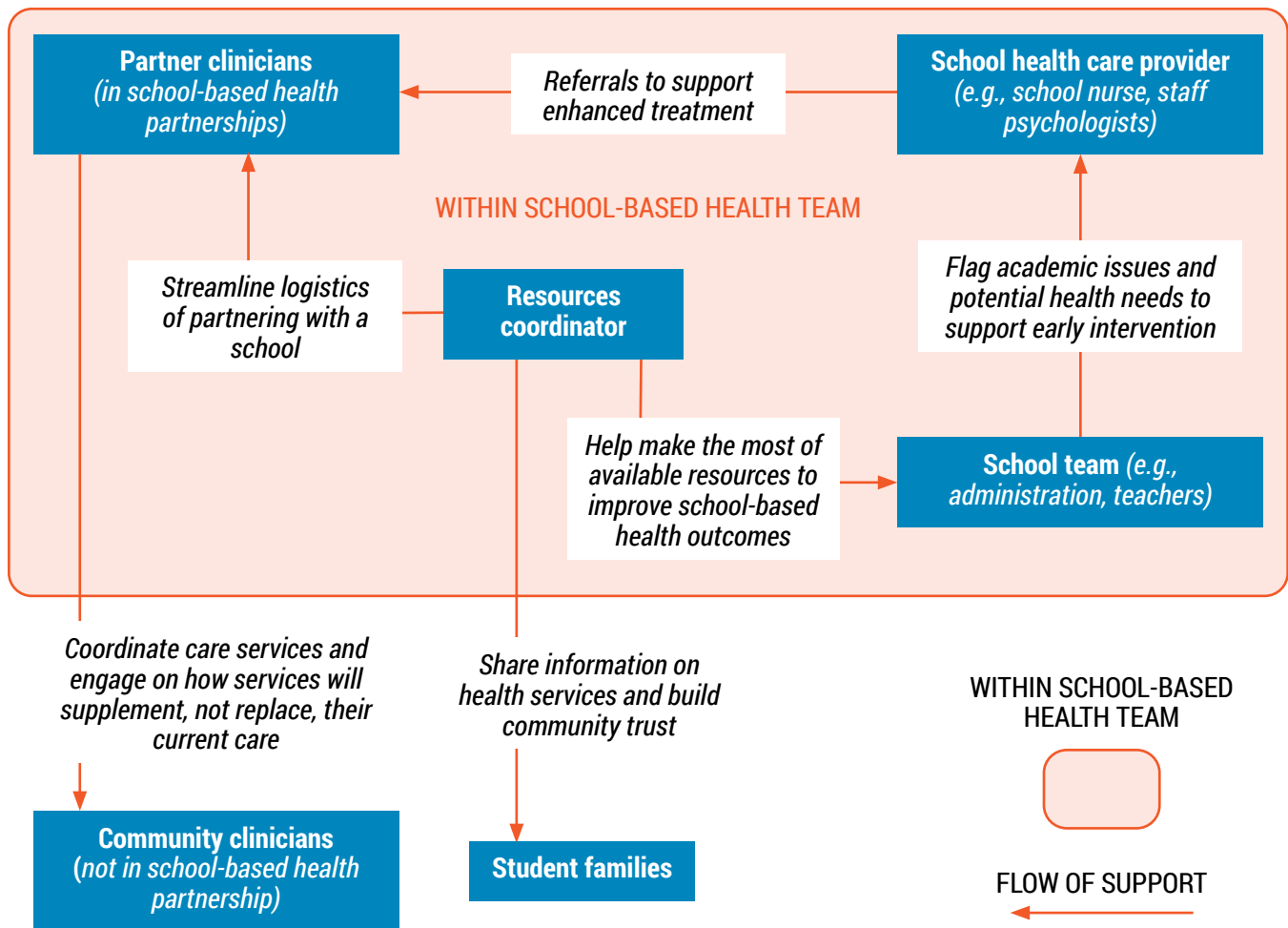
<b>Task</b> <i>What does your district need to do next?</i>	<b>Owner</b> <i>Who will be in charge of making sure this task is complete?</i>	<b>Deadline</b> <i>When will this task be complete?</i>

# Materials for focus group participants

**Agenda topic: Consider identifying a central coordinating role to act as a liaison between school staff, community mental health providers, students, and families**

The [School-Based Health Care Support Toolkit](#) (Ohio Department of Education) highlights the **importance of a central coordinating role, such as a resource coordinator**. A person in this role may be able to support schools in making the most of partnerships, while **building awareness and trust in services for students, staff, and families**. See a sample job description for the resource coordinator role [here](#).

**Key roles in school-based health efforts and how they support each other**  
*(image adapted from the Ohio Department of Education)*



Does your school or district have a similar coordinating role? If not, who currently does the work of a resource coordinator?

List the staff who currently do the work of a resource coordinator	What tasks do these staff do?	For districts, does this role exist at all schools?
		<input type="checkbox"/> All schools <input type="checkbox"/> Most schools <input type="checkbox"/> Some schools <input type="checkbox"/> Not sure/don't know
		<input type="checkbox"/> All schools <input type="checkbox"/> Most schools <input type="checkbox"/> Some schools <input type="checkbox"/> Not sure/don't know
		<input type="checkbox"/> All schools <input type="checkbox"/> Most schools <input type="checkbox"/> Some schools <input type="checkbox"/> Not sure/don't know

If the work is not currently done or is split between several professionals in different departments, consider whether to define a school-based resource coordinator within the district.

## Agenda topic: Plan roles and responsibilities for teachers, staff, administrators, and community mental health providers

Review the sample roles and responsibilities and adapt them for your district. Consider which roles exist in your district and which tasks or responsibilities are needed in your context.

Possible roles	Potential school-based mental health responsibilities
<b>Administrators and principals</b>	<p>Make key operational decisions and get buy-in from all internal and external stakeholders.</p> <ul style="list-style-type: none"> <li>• Organize resources needed to launch mental health services (e.g., physical space, technology, and transportation).</li> <li>• Work with the resource coordinator and partner clinicians to build systems, guidelines, and processes for delivering mental health care (e.g., guidelines for delivering services on campus and guidelines for referrals to off-campus services).</li> <li>• Work with district leaders, including the legal department and resource coordinator, to ensure policies are in place to uphold and protect student and family rights, privacy, and confidentiality.</li> <li>• Ensure partner clinicians are integrated with the school staff (e.g., by inviting them to staff events and providing a forum for questions).</li> </ul>
<b>Resource coordinator</b>	<p>Serve as a day-to-day liaison among school leaders, staff, community providers, and the greater community.</p> <ul style="list-style-type: none"> <li>• Coordinate policies and procedures related to mental health, including consent and release to receive services, and logistics for connecting students and families to additional resources (e.g., insurance and wraparound services).</li> <li>• Ensure community providers and school staff know, understand, and consistently follow policies and guidelines designed to protect student and family rights, privacy, and confidentiality.</li> <li>• Provide mental health services information to students, families, the community (e.g., at back-to-school nights and health fairs), teachers, and other school staff (e.g., new teacher orientation).</li> <li>• Support efforts to increase model sustainability (e.g., track performance outcomes and collaborate with teams to improve mental health programs).</li> </ul>
<b>School mental health support staff</b>	<ul style="list-style-type: none"> <li>• Perform an initial triage and, as needed, refer cases for outside care.</li> <li>• Work with community providers and partners to ensure treatment compliance (e.g. medication administration) and follow-up care for students with chronic conditions.</li> </ul>

Possible roles	Potential school-based mental health responsibilities
<p><b>Community providers</b></p>	<ul style="list-style-type: none"> <li>• Administer treatment to students with necessary family consent, making additional referrals to other providers where necessary.</li> <li>• Partner with other community clinicians to ensure coordination of care across providers.</li> <li>• Lead sessions for families, teachers, and the community to share the services.</li> <li>• If delivering care in the school environment, treat students as they would be treated in a traditional health clinic, while remaining conscious of the key differences in caring for students in a school environment. (Providers can use <a href="#">this toolkit</a> for guidelines on working at schools.)</li> </ul>
<p><b>Teachers</b></p>	<p>Serve as trusted partners for community providers, school mental health support staff, and the resource coordinator to relay relevant academic information and support early intervention (e.g., referring students for assessment and support, sharing observations with providers).</p> <ul style="list-style-type: none"> <li>• Share relevant health and academic observations through the relevant referral systems (e.g., discuss student challenges with school health care providers).</li> <li>• Work with clinicians to ensure school-based mental health efforts are minimally disruptive to the classroom (e.g., when it is crucial to have students in class and how to pull students out of class).</li> </ul>

Source: Adapted from the [School-Based Health Care Support Toolkit](#) (Ohio Department of Education)





## Agenda topic: Identify next steps and begin taking action

<b>Task</b> <i>What does your district need to do next?</i>	<b>Owner</b> <i>Who will be in charge of making sure this task is complete?</i>	<b>Deadline</b> <i>When will this task be complete?</i>

# Regularly review data with community providers



## Who is this tool for?

This tool is designed for school and district staff responsible for establishing and maintaining relationships with community health organizations or other external partners who provide student mental health services.

Example roles include district heads of student support, members of district student support teams, and community partnership coordinators.



## Steps for using this tool (*supporting materials follow*):

1. Understand best practices when it comes to sharing data to improve care while protecting the privacy of students.
2. Define your data strategy according to data-sharing best practices.
3. Determine what data districts and community providers will look at together to ensure effective referral pathways and delivery of services.
4. Prepare prompts to use when discussing data with community providers.
5. Begin the data review with community providers. Assess how the first discussions went and make improvements.

**Before sharing any data, consult with your legal team to ensure you understand and are adhering to all rules and regulations governing data confidentiality.**

## OBJECTIVE 1

### Understand best practices when it comes to sharing data to improve care while protecting the privacy of students

School-based mental health support involves many questions regarding confidentiality and information sharing. Confidentiality and information-sharing laws have implications for early referral and identification, continuing service delivery, outcomes, and evaluation.

Steps and practices to consider for protecting student confidentiality include:

- Reviewing rules and regulations (e.g., HIPAA, FERPA, state laws, and ethical guidelines).
- Developing interagency agreements or memoranda of understanding and policies.
- Creating authorization forms (e.g., “authorization to release” or other types of consent forms granting access to personally identifiable information).
- Training staff on relevant rules and regulations, policies, and procedures.
- Using appropriate technology and relevant cybersecurity safeguards to securely share information.

This [resource on information-sharing](#) (Education Development Center) discusses these practices in more detail.

Districts can also consult this [Department of Education resource](#) for additional cybersecurity considerations.

## OBJECTIVE 2

### Define your data strategy according to data-sharing best practices

The following worksheet is reproduced from a webinar released by the Substance Abuse and Mental Health Services Administration on [HIPAA and FERPA in Schools: Sharing Information to Improve Outcomes](#). This worksheet is designed to help you figure out why, how, and when schools and community providers will share information. While completing the worksheet, your district might find it helpful to view the webinar.

#### Step 1: Mapping your information sharing vision

Who are the partners?

What information are we hoping each partner will share?

Why do we want that information? What are the goals the team is hoping to achieve?

When do we need the information? Is this an ongoing need? A one time need?

Where is the information housed and exchanged?

#### Step 2: With the answers to step 1 established, and with your legal team, ask:

Which laws, if any, apply?

Which options under that law would allow data sharing?

#### Step 3: Talk about non-legal factors that may encourage or limit sharing of information

Which options make sense given the purpose and other factors involved?

What tools do you need in place, if any?

Source: [HIPAA and FERPA in Schools: Sharing Information to Improve Outcomes](#) (Substance Abuse and Mental Health Services Administration)

## OBJECTIVE 3

### Determine what data districts and community providers will look at together

**Instructions:** Which metrics does your district plan to look at with community providers?

- Check off any relevant example metrics listed that your district or mental health providers **already collect**.
- Consider adding any relevant metrics your district or community mental health providers **already collect that are not listed here**.

Potential meeting goal	Example metrics to review
Promote effective collaboration	<ul style="list-style-type: none"> <li><input type="checkbox"/> The percentage of <b>partner-employed providers completing school-level training</b> on policies and procedures.</li> <li><input type="checkbox"/> The percentage of <b>student-support hours provided by each partner</b> organization relative to the total support hours provided by all partners.</li> <li><input type="checkbox"/> The percentage of <b>partner organizations returning each school year</b>.</li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>
Ensure every student who needs services gets them	<ul style="list-style-type: none"> <li><input type="checkbox"/> The percentage of all <b>students referred</b> for mental health services.</li> <li><input type="checkbox"/> Of those students referred for services:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Percentage of students <b>offered the opportunity to initiate services</b> (regardless of parent or guardian consent).</li> <li><input type="checkbox"/> Percentage of students who <b>initiated services</b>.</li> <li><input type="checkbox"/> Percentage of students who <b>initiated services and are still actively receiving them</b> after one month.</li> </ul> </li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>
Measure and improve service delivery	<p><i>Based on your district and community providers' contexts, determine which metrics might be valuable to ensure the partnership is achieving its goals for students.</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>

Potential meeting goal	Example metrics to review
<p>Understand the effectiveness of delivered services</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Campus or district measures of student wellbeing</b> (e.g., from universal screeners or needs assessments).</li> <li><input type="checkbox"/> Student wellbeing service <b>effectiveness and satisfaction</b> survey data from stakeholders, including: <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Families and students (when age appropriate)</b></li> <li><input type="checkbox"/> <b>Staff or teachers</b></li> <li><input type="checkbox"/> <b>Mental health providers</b></li> </ul> </li> </ul> <p>You can use the resources in this <a href="#">evaluation of school-based mental health services (Wilder Research)</a> to create surveys and focus group questions. (In particular, see Appendix D: Interview instruments starting on page 49 and Appendix E: Survey instruments starting on page 53.)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>

**Reminder: Please consult with your legal team before sharing any student-level data.**

## OBJECTIVE 4

### Prepare prompts to use when discussing data with community providers

**Instructions:** This sample protocol is designed to be used as a handout for a recurring discussion among partners and school staff.

Consider adapting the sample to use with your district community mental health providers.

*Example:*

<b>Meeting goals</b>	<i>Assess the current systems for referring students and providing mental health services Use student wellbeing outcomes data to create action plans</i>
<b>Facilitator name</b>	
<b>Meeting date</b>	<i>Once a month/every two months A meeting like this could happen regularly (e.g., monthly), to ensure progress toward stated goals and highlight opportunities for growth</i>
<b>Attendees</b>	<i>Resource coordinator School head of student support Partner representative (e.g., manager of partner-employed providers)</i>
<b>Part 1: Reviewing the data</b>	<i>The meeting facilitator could pose the questions outlined here to the group for independent reflection, followed by a discussion and planning.</i> <ul style="list-style-type: none"> <li><i>• What can be celebrated in this data?</i></li> <li><i>• What elements of the data are concerning or do we need to look into further?</i></li> <li><i>• How does this data compare to last month's data?</i></li> <li><i>• What systems are working particularly well? What systems should be improved?</i></li> <li><i>• Do we have sufficient provider capacity to meet student needs next month?</i></li> <li><i>• What else have you seen that is driving this data or that might not be captured in the data?</i></li> </ul>
<b>Part 2: Committing to next steps</b>	<ul style="list-style-type: none"> <li><i>• What actions could we take based on this data?</i></li> <li><i>• What 1-3 actions will have the biggest impact? Who will own them and when will they be complete?</i></li> </ul>

**Instructions:** This sample protocol is designed to be used as a handout for a recurring discussion among partners and school staff.

Consider adapting the sample to use with your district community mental health providers.

<b>Meeting goals</b>		
<b>Facilitator name</b>		
<b>Meeting date</b>		
<b>Attendees</b>		
<b>Part 1: Reviewing the data</b>	<b>Notes:</b>	
<b>Part 2: Committing to next steps</b>	<b>Notes:</b>	



# Establish a calendar of meetings with community providers



## Who is this tool for?

This tool is designed for school and district staff responsible for establishing and maintaining relationships with community health organizations or other external entities that provide student mental health services.

Example roles include district heads of student support, members of district student support teams, and community partnership coordinators.



## Steps for using this tool (*supporting materials follow*):

1. Review your existing meeting calendar and reflect on how communication with community mental health providers currently happens.
2. Plan objectives and meeting times with community mental health providers.
3. Determine who will plan and schedule meetings.
4. For districts, work with schools to adapt the calendar for their needs and help them plan and run meetings.

**School-based mental health involves many questions regarding confidentiality and data sharing. As you plan communications with community providers, determine what data-sharing considerations need to be addressed before any information is shared.**

**Before sharing any data, consult with your legal team to ensure you understand and are adhering to all rules and regulations governing data confidentiality.**

Before planning the calendar, you might find it helpful to reflect on how communication with community mental health providers currently happens:

<b>What meetings or communication channels are working well?</b>	<b>How can the district improve communication with community mental health providers?</b>

## Plan objectives and meeting times with community mental health providers

**Instructions:** Select the example meetings that you want to have with community mental health providers or create your own calendar.

As you complete the exercise, consider these guiding questions:

- What considerations around data sharing need to be addressed before any information is shared? See [here](#) for resources on reviewing data with community providers.
- Are there opportunities to add these agenda items to existing meetings?
- What other agenda items are important for your communication with community mental health providers?
- For districts, which meetings should ideally happen at all schools? Which meetings should be optional for schools?
- Does the partner work more closely with the school or district staff?
- Which staff are essential for these meetings? Which staff members' attendance should be optional?

Potential meeting	Potential frequency	Should this meeting happen with schools and/or districts?	Potential attendees	Potential topic(s)	Promote effective collaboration	Ensure every student who needs services gets them	Measure and improve service delivery	Understand the effectiveness of delivered services
MOU renegotiation	Renegotiate MOUs every 1-2 years; 2 or more meetings per MOU renegotiation (frequency depends on length of MOU)	<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting	Director of student support “Owner” of relationship with community provider (e.g., a district-level resource coordinator or staff member) Community provider representatives	Discuss and finalize the details of a draft MOU (prepared in advance).	✓			
Kick-off meeting and goal-setting session	Beginning of each semester	<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting	Director of student support Community provider representatives	Celebrate progress and outcomes so far (e.g., improvement in KPIs, student and family testimonials). Share district student wellbeing goals and data to invite community providers as collaborators for achieving these goals. Share the calendar and a summary of the plan for community provider trainings and meetings.	✓		✓	
Annual community provider training	Beginning of each school year	<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting	Resource coordinator Community mental health provider School-employed mental health providers	Ensure school staff and community providers understand relevant school policies (e.g., the referral process, crisis response, roles and responsibilities with contact information, and student data policies).	✓	✓	✓	

Potential meeting	Potential frequency	Should this meeting happen with schools and/or districts?	Potential attendees	Potential topic(s)	Promote effective collaboration	Ensure every student who needs services gets them	Measure and improve service delivery	Understand the effectiveness of delivered services
<b>New community training</b>	Beginning of each semester	<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting	Resource coordinator New community mental health providers	Train new community providers to ensure they understand relevant school policies (e.g., the referral process, crisis response, roles and responsibilities with contact information, and student data policies).	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Operational update</b>	Every 1-2 months	<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting	Resource coordinator School head of student support Community provider representative (e.g., manager of community providers)	Review systems (e.g., billing, students referred vs. served, provider and student pulse surveys, provider utilization) and plan steps for improvement.  Determine student wellbeing support needs for the month (e.g., adding or reducing provider hours and availability times) based on referral trends and student wellbeing.  Plan modality shifts (e.g., telehealth, on-campus) to accommodate school needs (e.g., virtual schooling).	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
<b>Student progress update</b>	Every 2-4 weeks	<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting	Resource coordinator Community mental health providers School-employed mental health providers	Track how services are contributing to the wellbeing of all students receiving services and have focused conversations on specific students.		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

Potential meeting	Potential frequency	Should this meeting happen with schools and/or districts?	Potential attendees	Potential topic(s)	Promote effective collaboration	Ensure every student who needs services gets them	Measure and improve service delivery	Understand the effectiveness of delivered services
Other:		<input type="checkbox"/> Schools, add to existing meeting <input type="checkbox"/> Schools, create new meeting <input type="checkbox"/> Districts, add to existing meeting <input type="checkbox"/> Districts, create new meeting						

# Periodically assess how effectively your district is managing the relationship with community mental health providers

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## Who is this tool for?

This tool is designed for school and district staff responsible for establishing and maintaining relationships with community health organizations or other external partners who provide student mental health services.

Example roles include district heads of student support, members of district student support teams, and community partnership coordinators.



## Steps for using this tool (*supporting materials follow*):

1. Create an assessment to measure how effectively your district is managing its relationship with community mental health providers.
2. Periodically assess how effectively your district is managing its relationship with community mental health providers and make plans for improvement.

## OBJECTIVE 1

### Consider creating an assessment to measure how effectively your district is managing its relationship with community mental health providers

**Instructions:** Adapt this sample to create a rubric for your district. Consider the following guiding questions as you adapt the sample:

- What has worked in the district in the past that you would like to continue?
- What practices are most important to the district's student wellbeing goals?
- What challenges are most affecting the quality and quantity of wellbeing services delivered to students?

Does your district ...	Potential practices to consider <i>(please add your own)</i>	Never	Rarely	Sometimes	Often	Almost always	Always
<b>... effectively manage and communicate with community providers?</b>	Use MOUs or other agreements to detail the terms of the partnership (e.g., by whom, what, when, where, and how services or support will be provided) and how to adjust available service hours based on student needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Establish and use communication mechanisms (e.g., team meetings, email communications, and conference calls) to ensure ongoing and effective communication between school leadership or staff and community providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Create a shared protocol between the district and provider that clearly defines when and how to refer students (e.g., a referral pathway).  This includes creating and regularly updating the protocol with feedback from the community provider.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Train all community providers in the policies and procedures of referral, care, and data sharing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Train school and community-employed mental health providers on the same topics at the same time (e.g., evidence-based services or support, policies, or procedures related to Individualized Education Plans).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Clarify roles and responsibilities for school staff and community mental health providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Does your district ...	Potential practices to consider <i>(please add your own)</i>	Never	Rarely	Sometimes	Often	Almost always	Always
<b>... provide high-quality, integrated care to students?</b>	Provide staff and community partners with training and written guidance on protocols for care coordination and wraparound services for students with high mental health needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Ensure school staff understand the array of services available in the community for youth and families and have access to a regularly (e.g., at least annually) updated resource directory.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Assign responsibility for scheduling appointments to a school-based coordinator.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>... ensure the privacy of sensitive student and family data?</b>  See <a href="#">here</a> for resources on reviewing data with community providers.	Ensure that state and federal laws governing student records and confidentiality are followed.  For example, ensure that community providers understand the privacy laws governing education systems, such as FERPA, and that school staff follow laws governing health systems, such as HIPAA.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Ensure school and community providers communicate frequently with students, families, and relevant staff.  Ensure confidentiality guidelines are followed when school and community providers communicate with teachers, families, and other relevant stakeholders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Use data-sharing agreements, informed by youth and families, to facilitate the accessing and sharing of data for needed services and support and the impact of partnership activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

References:  
[NCSMH School Mental Health Quality Assessment – District Version](#)  
[Wisconsin School Mental Health Framework](#)  
[National Center for School Mental Health](#)

## OBJECTIVE 2

### Periodically assess how effectively your district is managing its relationship with community mental health providers and make plans for improvement

#### Step 1: Determine who will complete the assessment

Write down the names of staff who will complete the assessment. Consider examining your list with the following questions in mind:

- Do I have participants who regularly collaborate with community health organizations and other external partners on student mental health?
- Do these participants reflect the diversity of my district (e.g., grade levels and schools served, social and economic demographics, key stakeholder groups)?

Potential role to complete assessment	Name of staff member

#### Step 2: Complete the assessment

Consider personally asking the staff you identified to complete the assessment, providing instructions on how and by when to complete it.

### Step 3: Reflect on the results and plan action

Schedule a meeting or focus group with staff who completed the assessment. During the session, make plans to adopt or improve practices for collaborating with community providers. Consider the following thought starters.

What practices struck you as important to prioritize?	What can your district do to move toward high-priority practices?	Who will be responsible for moving toward these practices? How will district or school leadership support them?

### Step 4: Schedule time to revisit the assessment and review progress

At the end of the meeting or focus group, consider planning when you might repeat the assessment. Consider the following thought starters.

When will your district repeat this assessment?	When your district repeats the assessment, how will you know if you have made progress on your high-priority practices?