

What Comes To Mind When You Hear the Term:

- ▶ **Golden Thread**

- Think Fast! No wrong answers!



THE COLLECTIVE VOICE FOR ADDICTION & MENTAL HEALTH IN NY

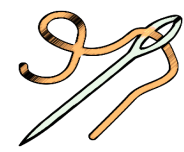
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The Alliance
for Rights
and Recovery

The Golden Thread of Documentation:



Connecting the Dots in Psych Rehab

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Objectives:

You will be better able to...

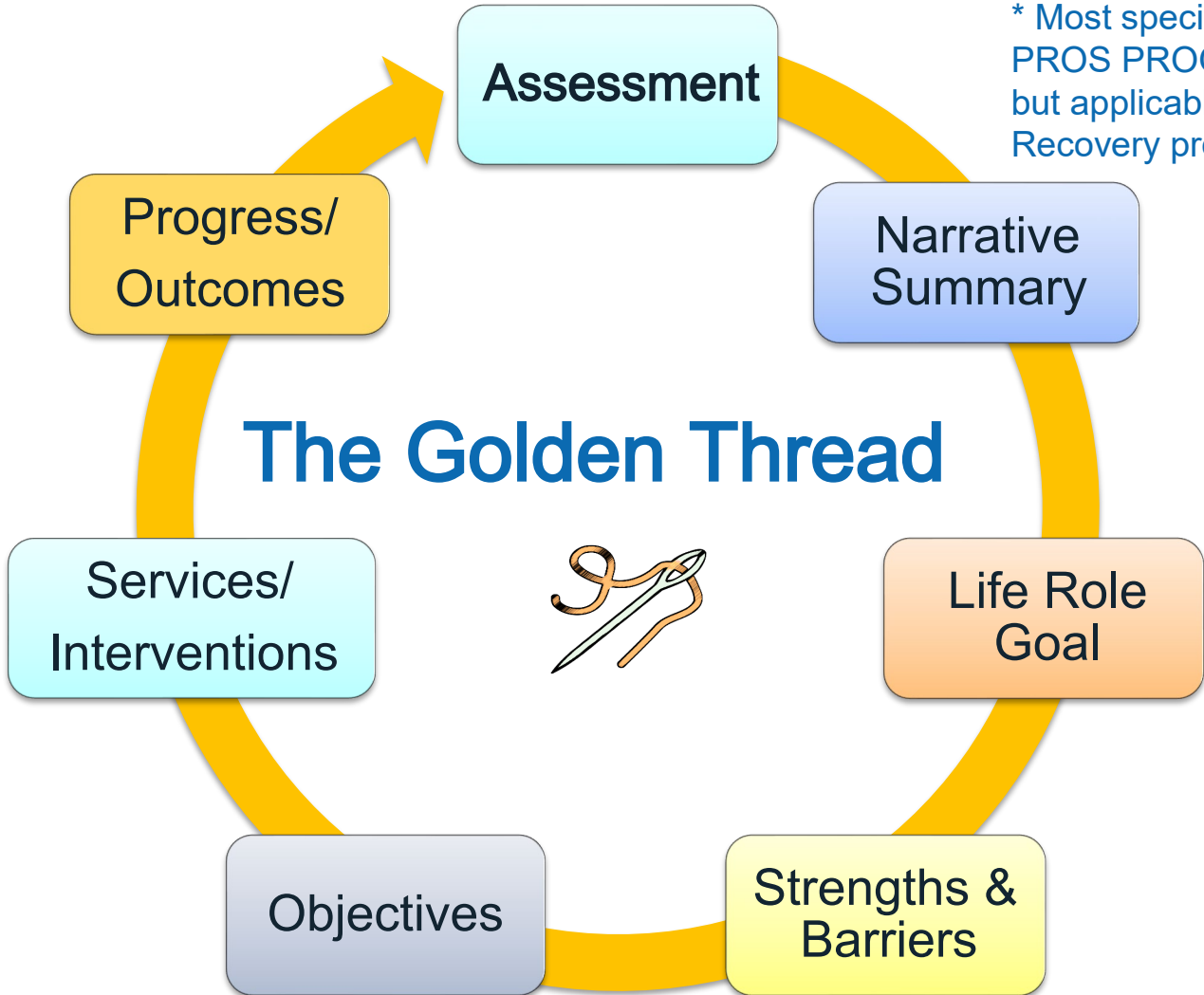
1. Understand the “Golden Thread” concept and its role in psychiatric rehabilitation documentation.
2. Learn techniques to align assessments, goals and documentation with participants' recovery journeys.
3. Apply feedback loops to connect administrative tasks with meaningful participant outcomes.

What is the Golden Thread?

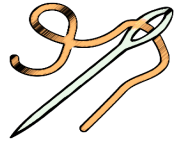
- ▶ It is our effort to utilize information learned to support a person in moving closer towards living the life they want for themselves. It is a **process** that is recovery oriented and offers each individual dignity.



The Golden Thread



* Most specific to PROS PROGRAMS but applicable to Recovery programs



The Golden Thread & Psych Rehab Recovery

Golden Thread

- **Assessment**- Comprehensive understanding of the individuals's story, strengths and barriers.
- **Narrative Summary**:Highlights key information
- **Life Role Goal**- Supports individuals in defining & pursuing life roles
- **Objectives**- Specific, actionable goals aligned with recovery progress
- **Services/Interventions** - Individualized support
- **Progress/Outcomes** - Ongoing, collaborative, progress monitoring

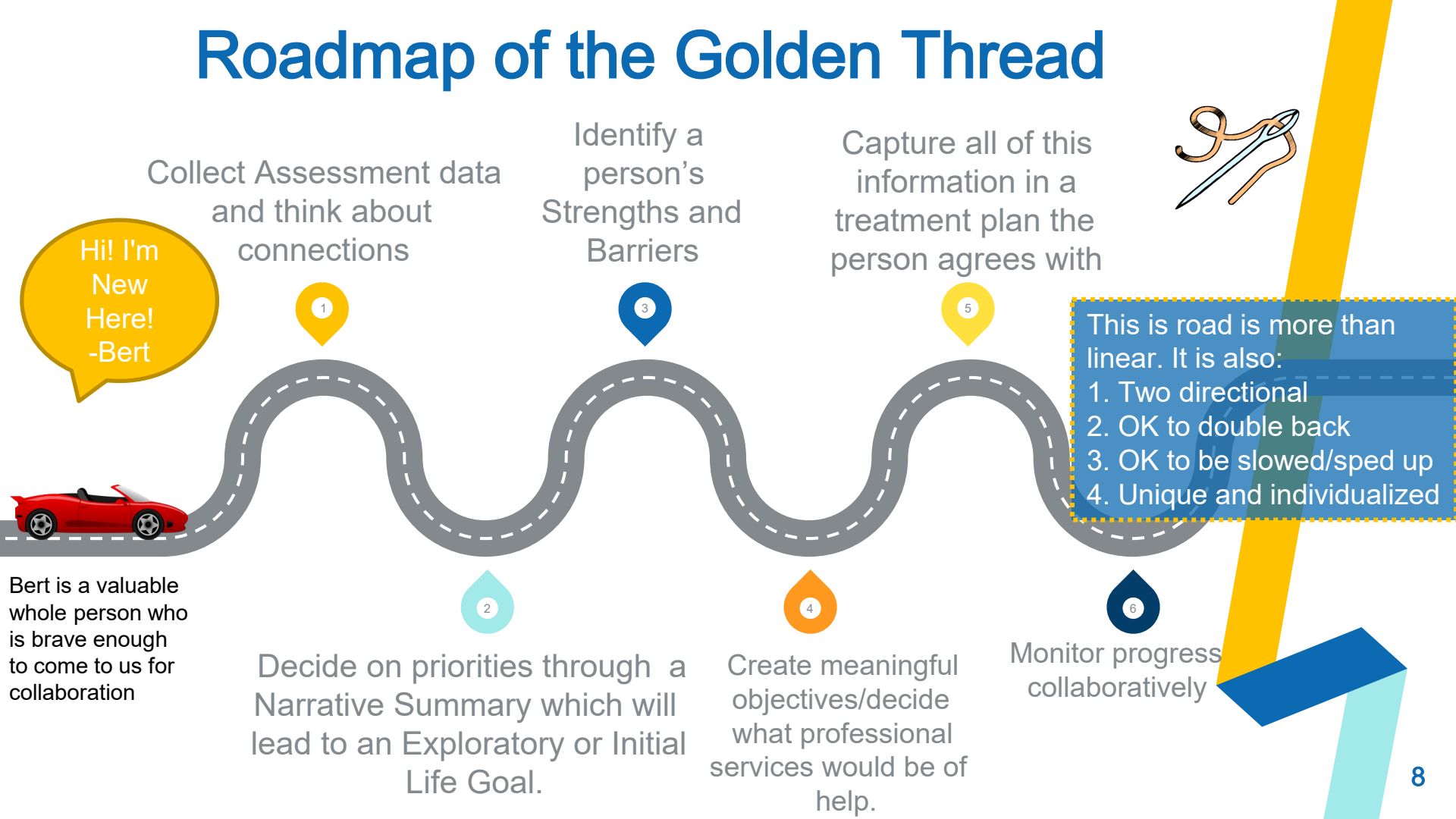
Shared Principles

- **Person Centered Care** - Prioritizing individual goals values and Choices
- **Goal Oriented Approach**- Emphasis on actionable steps towards recovery
- **Collaboration and Empowerment** - Individual and provider collaborate, respecting autonomy.
- **Progress Clarity**- Clear tracking and documentation to ensure alignment with personal objectives.

Psych Rehab

- **Strength Based Approach**- Leverage personal gifts and capabilities
- **Empowerment** - The individual leads the recovery journey.
- **Community Integration** - Aims for Independence and connection to community.
- **Voice and Choice**- Ensures Skills and Supports are relevant to the individual's needs in order to offer Success and Satisfaction

Roadmap of the Golden Thread



Hi! I'm New Here!
-Bert

1 Collect Assessment data and think about connections

2 Identify a person's Strengths and Barriers

3 Capture all of this information in a treatment plan the person agrees with

This is road is more than linear. It is also:

1. Two directional
2. OK to double back
3. OK to be slowed/sped up
4. Unique and individualized

Bert is a valuable whole person who is brave enough to come to us for collaboration

4 Decide on priorities through a Narrative Summary which will lead to an Exploratory or Initial Life Goal.

5 Create meaningful objectives/decide what professional services would be of help.

6 Monitor progress collaboratively



Assessments

Please share what comes to mind when you hear the word
Assessment

In This Room There Are No Wrong Answers

The issue with assessments..... :O



★ Assessments

★ “The creative practitioner does not see the strengths assessment as paperwork, but rather a canvas on which to create a portrait of the unique person that is before them.”

Assessments 101



Your approach will set the stage for your relationship with this person and their motivation to move forward.

Questions to ask yourself as you complete assessments with someone:

1. How would it feel to be asked these questions by a stranger?
2. How could this experience be improved?
3. How would I want my loved one treated in this moment?



Assessments 101 continued

- ▶ Are focused on the individuals' responses but include your own observation.
- ▶ Your observation will ideally be in the form of a short summary of the findings at the bottom
- ▶ If there is no summary, hint hint, there should be 😊

How can you make the time spent churning out assessments more bearable?

1. Take breaks as needed
2. Offer water
3. Orient the person with some points on what they can expect in this process
4. ASK THEM what would make them feel more comfortable
5. Acknowledge that they may be giving you details they have given many times before
6. Give warnings when questions will be personal/potentially activating



A Strengths - Based & Quality Assessment

▶ Strength - Based Assessment

- ▶ Understanding of the Whole Person
- ▶ Encourages Relationships & Engagement
- ▶ Develops a Recovery Alliance
- ▶ Identifies Strengths, Talents, Aspirations, Skills
- ▶ Creates Enthusiasm, Confidence & Motivation for Recovery
- ▶ Considers Stage/Phase of Change/Rehabilitation Process
- ▶ Focuses on Functional Abilities and Impairments vs. Symptoms

▶ Quality:

- ▶ Respects People's Boundaries, Limits, and Histories
- ▶ Identifies Various Ways to Assist in Meeting Goals
- ▶ Recognizes Supports to Help Achieve Goals
- ▶ Focuses on What is Going Right in a Person's Life
- ▶ Goes Beyond the Form: What Will Help You Know the Person?
- ▶ Demonstrates Medical Necessity and Determines Eligibility

Assessments for Bert



- ▶ Bert is a caring and determined man that has overcome many challenges
- ▶ He considers himself to be Jamaican American and reported being proud of his heritage.
- ▶ He has worked with his hands in the past as a home repair person but has not worked in about 6 years
- ▶ Bert reports having grown up in “a rougher part of brooklyn” with his mother who was a single mother and his sister Beatrice
- ▶ Has a history of alcohol misuse but has been sober for 11 months
- ▶ He identifies his biggest challenge as the distress of depressive feelings and the diagnosis of schizoaffective disorder that he doesn't fully agree with. Onset is about 27 years old.
- ▶ He would like to work on his own motivation in life as he pictures himself working and living independently
- ▶ He is currently living in a temporary housing that he doesn't like it but says its better that being homeless again
- ▶ He reports not having many social supports but hopes to grow in that area
- ▶ Bert has been observed by other providers as being paranoid and mistrusting of others
- ▶ He is taking his medication now but didn't always
- ▶ He is trying to manage his money better but is struggling to budget

Connecting Assessments to Narrative Summaries

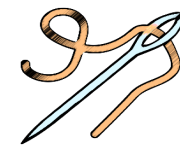
- ▶ Take home message: You are the bridger of assessment data
- ▶ Look for patterns, significant moments, achievements, strengths, people
- ▶ Create a bulleted checklist of important findings

Checklist for Bert:

- ▶ Hx of homelessness
- ▶ Money management
- ▶ Medication ambivalent
- ▶ Mistrust
- ▶ Limited social supports
- ▶ Possible paranoia
- ▶ Past alcohol use, found sobriety, has a sponsor
- ▶ Has a case manager, Beverly
- ▶ Hx of hosp after stopping meds
- ▶ Friendly and caring, funny
- ▶ Hx of working
- ▶ Some friends @ res
- ▶ Wants a new home and employment
- ▶ Ready to grow
- ▶ Beatrice still a support
- ▶ Bert has had both good and bad past experiences in treatment
- ▶ Has a psychiatrist he likes now



Roadmap of the Golden Thread



Collect Assessment data
and think about
connections

Leveraging a
person's
strengths and
Barriers

Capture all of this
information in a
treatment plan the
person agrees with

1

My
Goal
?

3

5



2

4

6

Decide on priorities through a
Narrative Summary which will
lead to an Exploratory or Initial
Life Goal.

Create meaningful
objectives/decide
what professional
services would be of
help.

Monitor progress
collaboratively

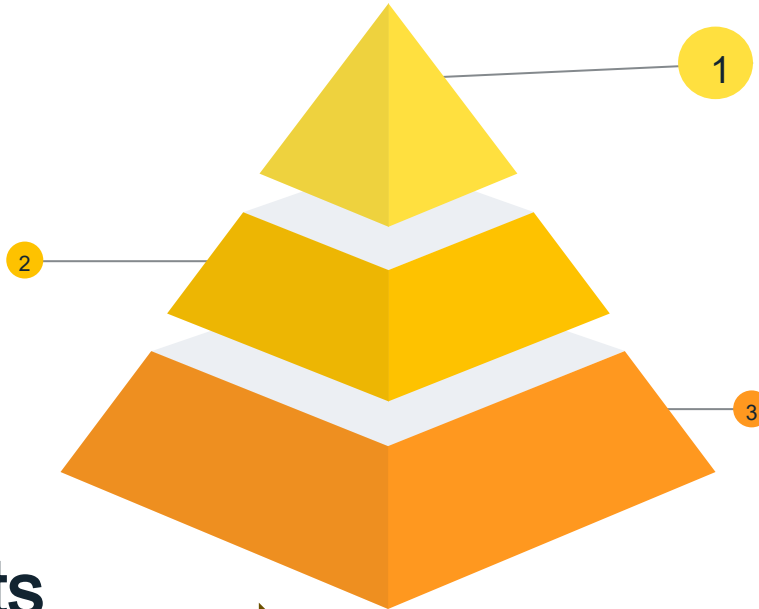
Putting It All Together: Choosing a Goal

Prioritize

While Most folks come to us with different issues they would like to address, let's try to hone in on one we can start on right now .

Assessments

Are the ground floor



Decide on a Life Goal

Picking one goal for now allows for us to focus on what is really important to the person. This may be an Exploratory goal.

Narrative Summary

Put all of this data you have collected together and create a summary that highlights all of the important things you have learned about the person

Narrative Summary Elements:

- Provider and person's perception of the individual's strengths, abilities, and achievements
- Initial vision for recovery and future goals
- Provider and individual's understanding of how barriers are related to MHC, and risk factors that impact the individual's functioning in valued life roles
- Prioritization of needs for recovery planning
- Provider and participant's evaluation and understanding of previous treatment/service outcomes
- Assessment by the participant and the practitioner regarding stage of change

***Go Beyond the Data**

Bert's Narrative Summary:

Bert is a friendly, charismatic man with great talent in working with his hands. He has shown resilience over the course of his life through overcoming a difficult childhood, finding sobriety and managing the distress of his symptoms of schizoaffective disorder. Bert loves to be around others and make them laugh but realizes that he is careful with who he trusts. He has a strong relationship with his sister, Beatrice who he speaks to twice a month and hopes to make her proud of his progress. Bert has experienced homelessness in his past but is now residing in a temporary residence where he is reportedly doing well and befriending others. He is becoming increasingly accepting of taking responsibility and control in his life which has led to him wanting to be more consistent with his medication, his money and his overall future. Bert explains that his goal is to be living on his own, making healthy choices and working for his keep...

Collaborating on Prioritization

Follow the Leader

The Person in front of you is the expert in their lives and what they need. What do they identify as their biggest goal?

Being a Support

Can you help the person to identify which goal would be helpful to work on first and may lead to the next goal?

Careful of Your thoughts

We may be tempted to make suggestions based on our own perception of needs. Make sure you minimize this as much as possible. Their deciding ensures their buy in.



Designing a Life Goal

Do we have someone who can bravely share a goal they have for themselves or a change they hope to make?

We used to do this funny activity...

Life Goals

The people we work with want
what everyone else wants...



A Successful Life Goal Is:

- **Important and meaningful**

What would achieving this goal mean to me?

How would it change my life?

What would be better if?

- **Constructive not “eliminative”**

Things that one is **GOING TO DO**, such as “attend college”

Things that one is **NOT GOING TO DO**, such as “stop feeling depressed”

Treatment
vs.
Recovery
Goals

Life Role Goal Domains



Living



Learning



Working



Relationships/
Social



Health and Wellness

Example: Life Role Goal Statements

- ❖ **Living (Housing):** I want to live in my own apartment in Brooklyn near transportation.
- ❖ **Learning (Education):** I want to earn my TASC (GED) within the next 12 months.
- ❖ **Working (Employment):** I would really like to work part time as a pet groomer.
- ❖ **Socializing (Leisure Activities/Relationships):** I would like to start an activities group for singles at my community senior center.
- ❖ **Health & Wellness:** I want to eat healthier food so I can have more energy to spend with my friends.

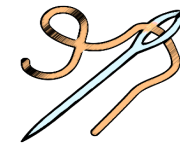


Bert's Goal:

“I want to live in an apartment on my own”.



Roadmap of the Golden Thread



Collect Assessment data and think about connections

1

Leveraging a person's strengths and barriers

3

Capture all of this information in a treatment plan the person agrees with

5



I'm good at what?

2

Decide on priorities by completing a Narrative Summary which will lead to a Life Goal.

4

Create meaningful objectives/decide what professional services would be of help.

6

Monitor progress collaboratively

Leveraging Strengths and Barriers

Strengths can be:

- ▶ Character traits
- ▶ Values
- ▶ Natural Supports
- ▶ Skills/Talents
- ▶ Experience
- ▶ Attitude

Barriers can be:

- ▶ Challenges brought on by a MHC
- ▶ Whatever is getting in their way

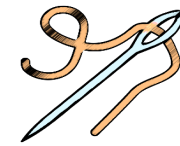


Leveraging Strengths and Barriers

Bert's Strengths	Bert's Barriers
Motivated	Minimal social supports
Support system Beatrice	Paranoia
Housing	Past homelessness
Desire to be independent	Afraid of going out alone
Resilience	Money Management
Employment skills	Mistrust of the system
Open to recommendations	Mistrust of others
Good with his hands	Staff concerns about his history
Humorous	Systematic trauma/institutionalization
Hard working	Scared to go to PCP
Takes his medication	Depressive feelings



Roadmap of the Golden Thread



Collect Assessment data
and think about
connections

1

Identify a
person's
strengths and
Barriers

3

Capture all of this
information in a
treatment plan the
person agrees with

5

You said
Homework
?

4

Decide on priorities by
completing a Narrative
Summary which will lead
to a Life Goal.

2

Create meaningful
objectives/decide
what professional
services would be of
help.

6

Monitor progress
collaboratively

Objectives

What the individual will do to move themselves towards the life they want.



A Successful Objective Is:

S = Simple, Straightforward, Specific

M = Measurable

A = Attainable, Action-Oriented

R = Relevant (to goal and stage of change)

T = Time-framed

- ✓ Litmus test for measurability - read objective aloud and ask: At the end of 1 month, etc., will you definitively be able to say yes / no that the objective was accomplished?

Keep It
Simple
Silly

Objectives Equation:

Within _____ (amount of time), (individual's name) _____ will have improved (insert documented mental health barrier) _____, as evidenced by _____ (insert a meaningful change in functioning/ behavior or action step that is related to the goal.)

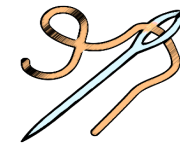
- Within the next 30 days (**time**), Bobby (**individual's name**) will have improved management of panic (**MH barrier**) as evidenced by successfully riding the subway to work without exiting the train before his stop (**change in functioning**).
- Phillamina (**individual's name**) will have increased social interaction (**MH barrier**) as evidenced by meeting a friend for coffee at Dunkin Donuts at least one time per week (**change in functioning**) within the next 30 days (**time**).

Bert's Objective:

Within _____ (amount of time), (individual's name) _____ will have improved (insert documented mental health barrier) _____, as evidenced by _____ (insert a meaningful change in functioning/ behavior or action step that is related to the goal.)

- Within the next 30 days (**time**), Bert (**individual's name**) will have improved management of depression (**MH barrier**) as evidenced by successfully reaching out to his friend at the residence once a week to talk about what he is looking for in a new apartment (**change in functioning**).

Roadmap of the Golden Thread



Collect Assessment data
and think about
connections

1

Identify a
person's
strengths and
Barriers

3

Capture all of this
information in a
treatment plan the
person agrees with

5

So, I
matter,
huh

Decide on priorities by
completing a Narrative
Summary which will lead
to a Life Goal.

2

Create meaningful
objectives/decide
what professional
services would be of
help.

4

Monitor progress
collaboratively

6

Assessments + Narrative
Summary + Strengths
and Barriers

Life Role
Goal

Objective

Objective

Interventions

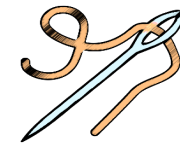
Interventions

Interventions

Interventions

**Make that
Treatment Plan!**

Roadmap of the Golden Thread



Collect Assessment data
and think about
connections

1

Identify a
person's
strengths and
Barriers

3

Capture all of this
information in a
treatment plan the
person agrees with

5

Let's
Do this



6

Decide on priorities by
completing a Narrative
Summary which will lead
to a Life Goal.

2

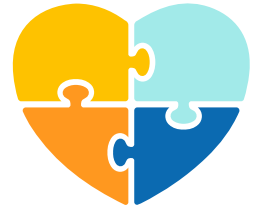
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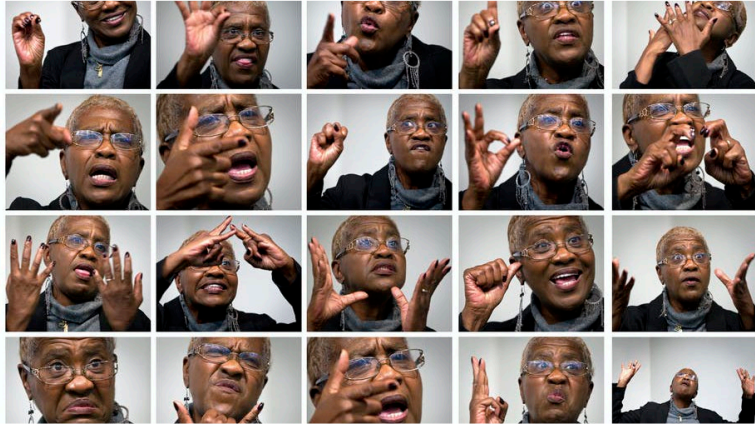
Monitor progress
collaboratively



Monitor Progress Collaboratively



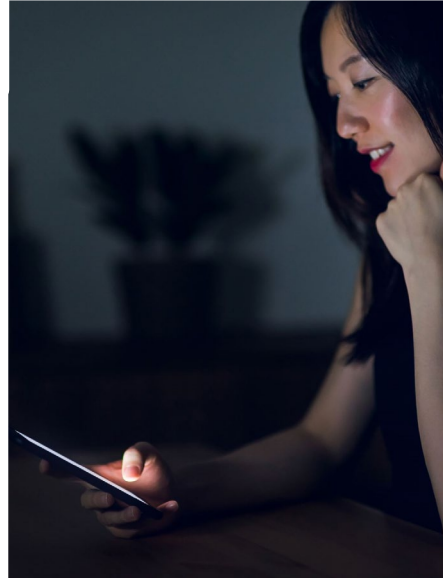
- ▶ Progress Notes
- ▶ Updated Assessments
- ▶ Check-ins
- ▶ Speaking with other providers
- ▶ Speaking with natural supports



THE POWER OF LANGUAGE



**What you say is a
reflection of what you
think and what you
believe...**



Other Language Considerations



Being judgmental and vague



Keeping an awareness of how our language impacts the people we collaborate with

- 01 The Use of Pronouns a person prefers
- 02 That Documentation can and should be shared with the person you are working with
- 03 You can be strengths based and still acknowledge barriers.
- 04 Language may be inherent in a program. Which was created with good intentions but maybe unintended impact. How do you refer to the people who come in for services?

Ways the Golden Thread is Strengthened or Lessened?

Strengths can be:

- ▶ Captures important information and ensures it is represented throughout the "story"
- ▶ Gives multiple opportunities to reassess and change course
- ▶ Is reactive to the changes in a person's life
- ▶ Honors the voice of the person and the observations of the person collaborating
- ▶ Is a balance between strengths and barriers

Lessened can be:

- ▶ Red Herrings
- ▶ Plot stops
- ▶ Lack of follow up
- ▶ The all mighty copy and paste
- ▶ Lack of exploration of readiness
- ▶ Lack of bridge between one staff member and the next
- ▶ Absence of process



What if There Was a Tool to Measure the Golden Thread?



GOLDEN THREAD STRENGTH CHECKLIST

ELEMENT	YES	SOME-WHAT	NO	SUGGESTIONS/NOTES
• Is the assessment data relevant to the individual's current goals and challenges?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Does the assessment reflect the person's life story, values, and desires?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Are the goals directly informed by the assessment data?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Are the goals written in a way that is meaningful & empowering for the individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Do the services directly relate to the goals outlined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Are services tailored to the individual's strengths, preferences, challenges and worldview?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Are the person's progress and milestones consistently monitored and documented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Is the progress clearly connected to the original goals set in the recovery plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Is the recovery plan regularly reviewed and adjusted based on progress and changing needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
• Does the individual's plan maintain a coherent thread from assessment through to progress and review?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Assessment
 Goal Development
 Interventions
 Progress Monitoring
 Review & Adjust



Let's Practice!

The Golden Thread

Objective:

Participants will map out the Golden Thread in practice, connecting assessment data to treatment planning and goal-setting.

Materials:

- Index cards or sticky notes
- Markers
- String or yarn
- Whiteboard or large poster paper
-



Instructions:

Each participant an index card or sticky note and marker.

Everyone will write down one component of the Golden Thread from the presentation (e.g., assessment, strengths, barriers, life goals, interventions).

Creating the Map (5-7 minutes):

- Arrange participants in a circle or at a table.
- Starting with the person who has written “Assessment,” pass the string/yarn to connect their card to someone holding a related principle (e.g., “Life Goals”).
- As the string is passed, each participant explains how their principle connects to the one before it.
- Continue until everyone is connected, forming a web.

Reflection (5 minutes):

- Discuss how the interconnectedness of these principles mirrors the Golden Thread in practice.
- Highlight key takeaways from the activity, emphasizing the flow from assessment to progress monitoring, as outlined in the presentation.



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**The Alliance
for Rights
and Recovery**

Thanks!

Any questions?

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