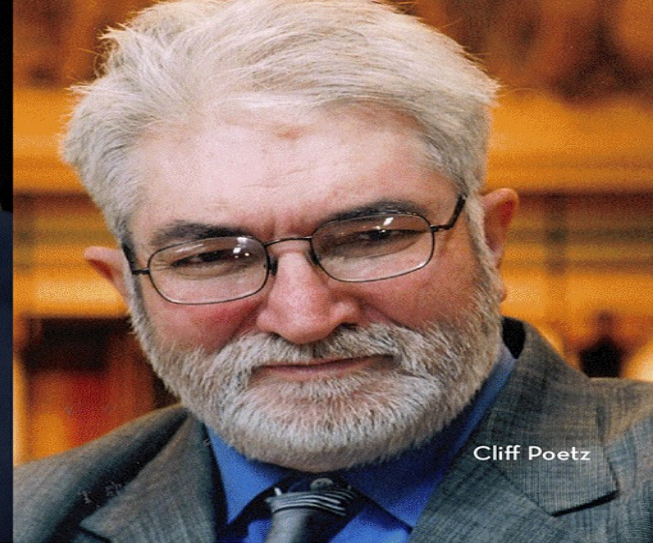




Amy Hewitt



John Smith



Cliff Poetz



I AM DRIVEN TO  
PROFESSIONALIZE THE DIRECT  
SUPPORT WORKFORCE



I AM DRIVEN TO RETHINK  
WHAT ACCESSIBILITY MEANS



I AM DRIVEN TO  
MAKE HOME OWNERSHIP A  
REALITY FOR PEOPLE WITH  
DISABILITIES

## Tiered On-site Evaluation Tool (TOET): 1-day Webinar

# **Tiered On-site Evaluation Tool (TOET) 1-day Webinar**



**Minnesota Department of Human Services  
Research and Training Center on Community Living  
Institute on Community Integration**

UNIVERSITY OF MINNESOTA  
**Driven to Discover**<sup>SM</sup>

# Today's Agenda

- Welcome and introductions
- Purpose and features of the TOET
- Preparing for and conducting the TOET
- Scoring the TOET
  - Activities and practice in each domain
  - Considerations for scoring each item
- The importance of inter-observer agreement
- Action planning
  - Increasing team familiarity with TOET content and process
  - Scheduling and conducting TOETs with reliability

**We will break at least every 60 minutes!**

# Welcome!

**PLEASE POST YOUR NAME AND  
AFFILIATION IN THE CHAT**



Poll

**HOW MANY TOETS HAVE YOU BEEN A PART OF IN THE PAST?**



CHAT

**WHAT DO YOU HOPE TO GET FROM  
TODAY'S TRAINING?**



# TOET

## PURPOSE

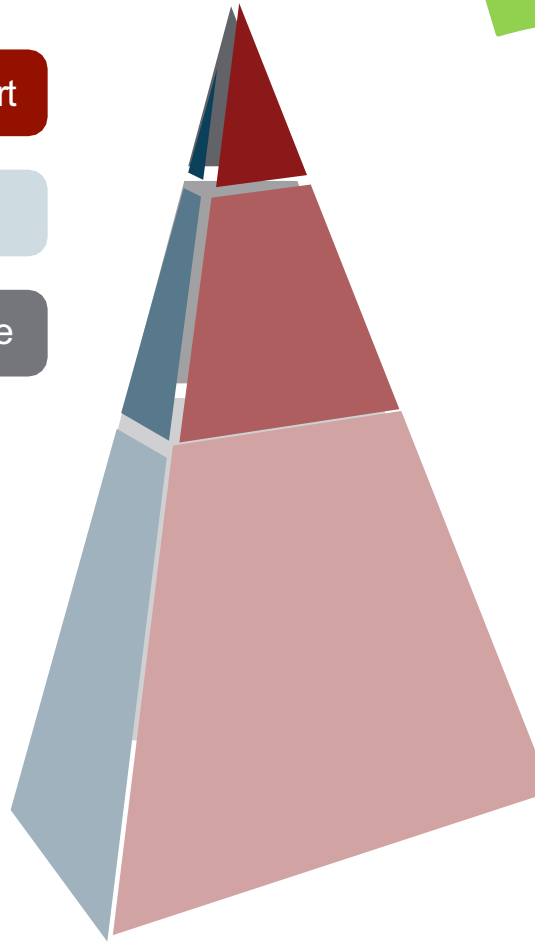


# Purpose of the TOET

Positive Behavior Support

Person-Centered Practices & Planning

Organizational Workforce



Fidelity of Implementation

Action Planning

MINNESOTA  
COMMUNITY  
INTEGRATION

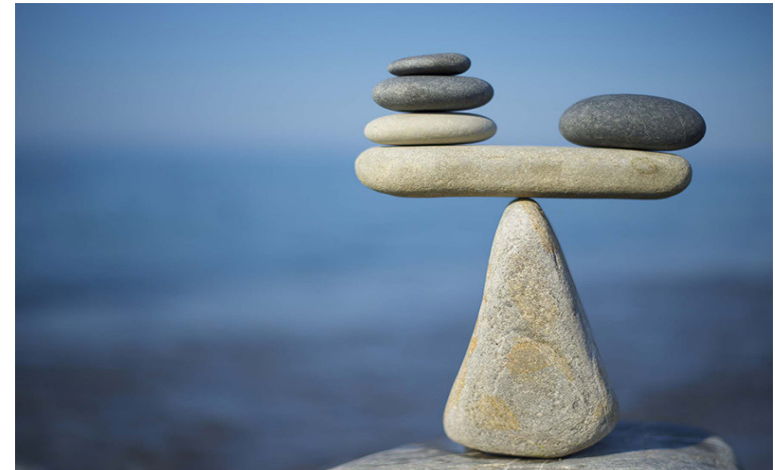
Learn community living





# Why It Is Important to Evaluate Implementation

- Targeting training time & energy
  - Trainers focus on particular support approach, person using supports, or staff
  - Work with staff to set their own goals – this enhances implementation
    - Cohrs et al., 2016
- Staff satisfaction and retention
  - Everyone wants to succeed, experience competence, be an effective teammate, and provide impactful supports



# Why It Is Important to Evaluate Implementation

- Determining the impact of a support plan
  - If everyone is implementing the plan as intended, then we know whether the outcome data are truly indicative of the plan's impact (or lack of impact)
  - Implementation makes a big difference in the outcomes that are possible (across settings and implementers)!
- Arkoosh et al., 2007; DiGennaro et al., 2007; DiGennaro-Reed et al., 2011; Fryling et al., 2012; Leon et al., 2014; Northup et al., 1997; St. Peter-Pipkin et al., 2010; Stephenson & Hanley, 2010; Wilder et al., 2006



# CHAT ABOUT IT!

- Where else do you monitor fidelity?
- What programs, activities, what tools do you use?
- Where have you experienced success with fidelity measurement?



# Purpose of the TOET

- Intended to be used within a framework of implementation science to ***help teams work toward:***
  - Improving QoL for people receiving supports
  - encouraging relationship building
  - learning and practicing social and emotional wellness
  - responding to challenges using conflict resolution, empathy, and culturally responsive practices
  - designing settings where all people feel respected and experience positive recognition and feedback



# Purpose of the TOET

- The TOET **guides** teams implementing Tier One universal person-centered and positive behavior support (PBS) practices:
  - person-centered strategies for relationship building across settings
  - establish strategies for promoting positive social skill development by staff members, people supported, family or guardians, and community members
  - creating opportunities to recognize and celebrate positive social interactions
  - establish data-based decision making
  - monitoring quality of life and social interactions to identify people who would benefit from targeted group or individualized strategies



# TOET

## FEATURES



# TOET – Organized Around 7 Subscales of Implementation

1. Team Action Planning and Stakeholder Involvement
2. Universal Person-Centered Practices
3. Universal Positive Behavior Support
4. Cultural Awareness and Competence Strategies
5. Monitoring Plans and Organization-wide Data for Decision Making
6. Support for Staff Learning New Skills
7. Visibility



# Team Based



TOE  
(exter

Team



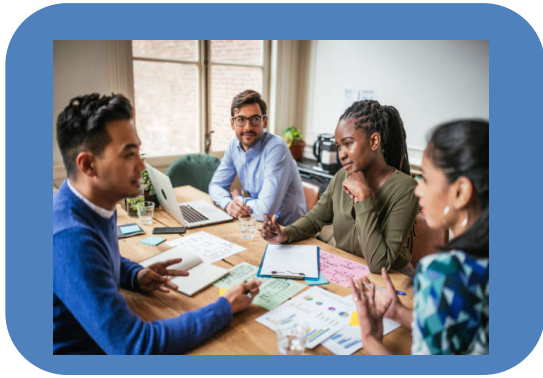


# Frequency

- Once a year with an external TOET Facilitator
- Self-Evaluation throughout the year
  - 2-3 times a year during regularly scheduled meetings to guide action planning
  - Celebrate success
  - Focus on areas needing action
  - Considerations:
    - Recruit team member with more experience with PC-PBS practices to guide the TOET



# TOET: Guided Approach to Monitoring Fidelity



Interviews



Product Review



Direct  
Observation



# Time and Costs

- No cost to access the TOET
  - It is recommended teams use the TOET with guidance from someone with experience implementing PC practices and PBS
- Completing an onsite TOET can take 2-3 hours
  - Interviews
  - review products and documents
  - direct observations



# TOET

## **PREPARING FOR AND COMPLETING**

Reflect on how you will be utilizing the TOET. What is or will be your role with the TOET in your organization or county?



# TOET Facilitators: Preparing for the TOET

- **Six to eight weeks in advance**
  - Reach out to organizations and schedule date for TOET
  - Ask team to review, collect, and organize documentation (See Appendix A & B)
  - Consider what materials need to be organized for onsite participants
- **One to two weeks in advance**
  - Confirm the date and location with attendees
  - Remind the team to finalize collection of documentation
- **One week in advance**
  - Ask team to send documentation to the facilitator for review prior to the TOET
- **One to two weeks after the evaluation**
  - Facilitator summarizes and discusses the results with the team
  - Facilitator updates the organization's graph showing fidelity by subscale



## Before

- Team identifies a TOET facilitator OR TOET facilitator identifies contact person(s) for team
- Identify teams/personnel
- Schedule interview
- Collect products/documents

## During

- Review TOET items with team
- Review supporting documents
- Discuss scoring

## After

- Provide summary of scores
- Provide actionable suggestions
- Be available for questions



# Before: Organization Teams

- The team decides who should attend - the types of people participating may vary
- Full team members are encouraged to actively participate
- Some organizations bring the entire team together, others choose a subset
- Teams need to include individuals with knowledge of PC and PBS implementation



# Before: Materials, Products, Data

**Ask for  
materials  
in advance!**

## Appendix A: Complete List of Evidence to Collect in Tier 1: Universal Practices

### Tier 1 Universal Practices: Products to Collect (if they apply to your organization's efforts)

- Your organization's vision and/or mission statement
- Policies related to person-centered practices and positive behavior support
- Team Action Plan
- Team meeting agendas and meeting minutes from staff and/or team meetings
- Results of consensus documentation or voting practices
- Your team's outcome statements
- Organizational chart and/or documentation of team roles, names of team members documented
- Appendix B: Team Capacity Measurement Tool
- Annual Informal Interviews: Evidence of implementation efforts from interviews with people receiving supports, coaches, PBS facilitators, etc.
- Evidence of PCO team members' participation in organizational policy change workgroups or committees
- Evidence of Person-Centered tools being used
- Coaching and/or mentoring schedules
- Person-centered profiles from staff and/or people receiving supports (deidentified, as needed)
- Training materials used for new staff or ongoing staff development
- Your organization's matrix (positive behavior support)
- Units/departments/divisions one page description to identify their own mission, vision and values





# Team Materials, Products, Data

- Examples of evidence at Tier One include:
  - Meeting agendas and meeting minutes
  - Policy and procedural documentation
  - Data collection strategies and summarized data
  - Calendars
  - Training materials, presentations
  - Newsletters



# Before: Materials, Products, Data

## Appendix B: Team Capacity Measurement Tool

How many total staff are currently employed in your organization (number of employees, not FTE)?

Total Staff in Organization (Number of People, not FTE)	
---	--

How many staff in your organization are involved in the following roles?

Number of staff trained = The total number of staff trained since you began work in TIPPS. Include all staff who have discontinued working on your organization's team and those who have left your organization.

Number of staff currently active on your team = The total number of staff who are currently participating in your organization's team efforts.

	Number of Staff Trained	Number of staff Currently Active on Team
Person-Centered Coaches		
Person-Centered Coach Trainers		
Person-Centered Thinking Trainers		
Person-Centered Planners		
Key Contacts		
Positive Behavior Support Facilitators		

How many trainers or contractors have provided these services for staff or people in your organization **since the last TOET**?

Number of trainers or contractors = People who provide these services but are not on your organization's regular payroll (i.e., they are not a regular weekly employee in your organization).

	Number of trainers or contractors
Person-Centered Thinking Trainers	
Universal Person-Centered Coach Trainers	
Person-Centered Planners	
Positive Behavior Support Facilitators	



# Before: Organizing Team Materials, Products, Data

- De-identifying information
- Organize folders according to TOET domains
- Keeping the information up-to-date makes it easier for the team since it decreases the need to prepare later



# Materials to Prepare

- Teams that have been implementing for a longer period of time are encouraged to increase the type of evidence that demonstrates Tier 1 implementation.
- Capacity Measurement Tool (Appendix B)
- Direct Observation (Appendix C)
  - Confirm objective Tier One changes occurring within the organization
  - Tailor to unique context of the organization
  - Recruit guidance from person with experience in PC-PBS
- Annual Informal Interviews (Appendix D)



## Appendix C: Direct Observation Tool

# Appendix C

Date and Time of Observation: \_\_\_\_\_ Number of People in the Setting: \_\_\_\_\_

Setting Observed: \_\_\_\_\_

**Instructions:** For more information about the definitions and how to create a plan for direct observation, please visit the [Training Materials page on Organizational Evaluation](#).

### Part 1

*Observe up to two staff while they are working or observe up to two people who are being supported using the list below.*

#### A. Promoting Social Engagement and Interactions

<u>Item Observed</u>	Minutes 0-5	Minutes 5-10	Minutes 10-15	Minutes 15-20
Encouraging Others to Interact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting Choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reinforcing Others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subtotal Person-Centered Behaviors Observed				_____/12 _____%

### Part 2

*Observe up to two staff while they are working or observe up to two people who are being supported using the list below.*

#### A. Opportunities to Participate in Positive Social Interaction

<u>Item Observed</u>	Minutes 0-5	Minutes 5-10	Minutes 10-15	Minutes 15-20
Active Involvement in Conversations/Meetings/Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaging in Identified social Behaviors:				
Person Centered Value 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person Centered Value 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person Centered Value 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person Centered Value 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## Appendix D

### Appendix D: Annual Informal Interviews

Informal interviews can be used on the day of the onsite or during a designated time period soon after to collect information from staff members and people supported. The goal of the annual informal observation is to gather evidence that Tier 1 implementation is occurring by contacting a random selection of people and asking them 2-3 simple questions.

The manner in which these data are collected need to be adjusted for the type of organization receiving services. The external evaluator will need to come up with a plan to gather information prior to the onsite visit. The goal is to randomly select staff members and people supported and interview them to better understand the impact of Tier 1 implementation.

Appropriate questions for the interview may include:

- 1) What are our values at our organization (or in this setting)?
- 2) What training have you received to date on the matrix? Have you found this helpful?
- 3) What things has our team/organization done that are person-centered?
- 4) What things has our organization done that promote a positive universal level?
- 5) How do we address quality of life?

Questions should be modified as needed to include discussions with people across the organization, including people receiving support, family members, direct support staff, supervisory staff, etc.



# Tele-administration of TOET

- Teams can complete the TOET via video conference with external evaluator or with a colleague from another organization
- Particularly help for teams in rural areas
- During the first TOET, onsite support is helpful for establishing a direct observation system
- When this model is used, helpful to prepare de-identified data and supporting evidence in electronic folder (e.g., BOX, Google Drive, etc)



TOET

**FACILITATING AND SCORING**





# Navigating the TOET: Organized Around 7 Subscales of Implementation

1. Team Action Planning and Stakeholder Involvement
2. Universal Person-Centered Practices
3. Universal Positive Behavior Support
4. Cultural Awareness and Competence Strategies
5. Monitoring Plans and Organization-wide Data for Decision Making
6. Support for Staff Learning New Skills
7. Visibility



## Feature

- Provides an overview of what is being measured

## Possible Data Sources

- Provides a list of possible data sources to use when deriving a score
- Data sources: permanent products, impact data, team member input, fidelity data, direct observation

## Scoring Criteria

- 0 = Not implemented
- 1 = Some evidence available (includes some features)
- 2 = Fully implemented (includes all features)



# Facilitating The TOET Administration

- By the day of the meeting
  - Team is identified
  - Materials, products, data are available
- Facilitator leads team through interview format
  - TOET Guidance questions
  - Review pertinent evidence during the interview
  - Score as you go

## Guidance Questions for the TOET Interview

### Team Action Planning and Stakeholder Involvement

**1.1 Team Composition:** Tell us about the members that are currently on your team and who attends the meetings.

**1.2 Team Effectiveness:** Which meeting processes are in place for your team meetings?

**1.3 Stakeholder Involvement:** How do you communicate what is happening on your team with self-advocates, community members, staff, families, and others?

**1.4 Consensus Building and Staff Decision Making:** Tell us what your team has done to assess readiness and build consensus among people at your organization? (e.g., using the Person-Centered Organizational Development Tool)

### Universal Person-Centered Practices

**1.5 Organizational Alignment:** Show us your vision and mission statement. How are they aligned with person-centered values? How are your team's outcome statements aligned with these?

**1.6 Policy Alignment:** How are person-centered practices evident in your policies and procedures?

**1.7 Universal Person-Centered Strategies:** How are person-centered strategies used in your organization, and in which settings are they used? Are systems in place for mentoring or coaching staff in these practices?

**1.8 Active Staff Support:** How have you assessed staff support of person-centered practices in the area(s) where you are implementing?

### Universal Positive Behavior Support

**1.9 Organizational Policy Alignment:** Tell us about your policies and practices for building positive social environments.

**1.10 Positive Social Interactions & Skills:** Have you identified organizational values and behavioral expectations in any settings in your organization? How do you teach positive social skills, and what is your plan for expanding these skills across the organization?

**1.11 Positive Feedback and Acknowledgement:** How do you acknowledge the behaviors that you want to see in your organization?

**1.12 Consistent Response to Problems That Occur:** How do you respond to problems that occur in your organization?



# Scoring TOET Features (items)

- Score each item according to the 0-1-2 rubric:
  - 0 = not in place
  - 1 = some evidence available (includes some features)
  - 2 = fully implemented (includes all features)
  - Make notes regarding considerations that could improve implementation.



# Reflect and Share

- What brought you here today?
- What do you hope to get out of this TOET training?



# Section 1

## **TEAM ACTION PLANNING AND STAKEHOLDER INVOLVEMENT**



Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>Working team composition includes administration, key contact(s), universal person-centered (PC) coaches, and practice expertise, PBS expertise, human resources, management, and direct staff</li> </ul>	<ul style="list-style-type: none"> <li>Organizational chart or documentation</li> <li>Meeting Minutes</li> <li>Interviews</li> </ul>	<ul style="list-style-type: none"> <li>0 = Team exists but roles are not represented</li> <li>1 = Team exists but some key team members do not attend, or attend less than 80% of the meetings</li> <li>2 = Team members representing key roles attend over 80% of meetings</li> </ul>

## Interview guidance

"Tell us about the members that are currently on your team and who attends the meetings."



# 1.1 - Team Composition: Scoring Examples

## Example Score of 0

- Org chart indicates the team exists but roles have not been set or identified

## Example Score of 1

- Meeting minutes indicate the team meets regularly but the PC coach and PBS facilitator attend only 50% of the time

## Example Score of 2

- Meeting minutes indicate the full team meets monthly and attendance is 90% across team members





# 1.1 - Team Composition: For Consideration

- **Review meeting minutes for the last 6 months re: attendance**
  - % of the team in attendance each month
  - Average % attendance in the last 6 months
- **For county TOETs**
  - Consider that key contacts and coaches may be siloed
  - Need bridge or meeting when everyone comes together to share information
  - Do any staff cross between meeting groups? Need lay of the land on who is involved within what structure.



## Feature

- Team meets regularly and has at least four effective meeting processes that include:
  - Regular monthly meetings
  - Meeting minutes/agenda
  - Defined roles
  - Action plan in place

## Possible Data Sources

- Agenda, meeting minutes
- Roles and people clearly documented
- Action plan
- Observation

## Scoring

- 0 = Team does not have the four effective meeting processes in place
- 1 = Team meetings include at least two of the four effective meeting processes
- 2=Team includes all four meeting processes

## Interview guidance

"Which meeting processes are in place for your team meetings?"



# 1.2 - Team Effectiveness: Scoring Examples

## Example Score of 0

- The team has a current action plan but report that they have been unable to leverage team meetings over the past year.

## Example Score of 1

- Minute meetings are reviewed and illustrates they have a agenda and minute format. Team has a current action plan (updated within the past 12 months). However, the team has been unable to meet regularly (quarterly meetings) and they have not defined the roles (e.g., facilitator, minute taker, time keeper).

## Example Score of 2

- Minute meetings are reviewed and illustrate regularly occurring meetings (monthly). Team member names and roles (e.g., facilitator, minute taker, time keeper) are listed on the agenda and minute meeting documents. Team provided a current action plan (updated within the past 12 months).



# 1.2 - Team Effectiveness: For Consideration

- **For county TOETs**
  - What teams are operating, within which divisions?
  - What key personnel are part of those teams?
  - Operating procedures should be similar, roles should be similar.



# 1.3 - Stakeholder Involvement

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• System in place for involving all stakeholders in the planning process (self-advocates, community members, other agency representation, family members)</li></ul>	<ul style="list-style-type: none"><li>• Meeting minutes from staff and team meetings</li><li>• Email and correspondence</li><li>• Action Plan</li><li>• Opinion surveys</li><li>• Feedback loop (newsletter, annual report with public comment option)</li></ul>	<ul style="list-style-type: none"><li>• 0 = No evidence that stakeholders are involved</li><li>• 1 = Some evidence that stakeholders are involved but in an informal manner with no formal ongoing process for involvement</li><li>• 2 = Formal meetings are scheduled in advance and documentation is gathered by team to use in ongoing action planning</li></ul>

## Interview guidance

"How do you communicate what is happening on your team with self-advocates, community members, staff, families, and others?"



## Example Score of 0

- Meeting minutes include no mention of stakeholder involvement

## Example Score of 1

- Meeting minutes indicate special occasional appearances by stakeholders but they are not regularly involved

## Example Score of 2

- Parent and self-advocate group produces monthly newsletter in collaboration with PC coaches



## 1.3 - Stakeholder Involvement: For Consideration

- **Define which categories of stakeholders should be involved**
  - Perhaps contextualized for each organization with a few non negotiables (like family or people supported)
  - Can look different for small orgs vs large orgs vs counties
- **For county TOETs**
  - Certain divisions lead certain efforts, and may respond to community boards for strategic planning, county wide initiatives
  - PC / PBS initiatives may not cross over between divisions



Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>• Strategies for staff member involvement are used to build consensus and involvement (regular agenda items in staff meetings, surveys or other strategies for gathering information)</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting minutes from staff and team meetings</li> <li>• Results of voting documented</li> <li>• Staff meetings</li> <li>• Action Plan</li> </ul>	<ul style="list-style-type: none"> <li>• 0 = No evidence that readiness assessment was conducted or staff members are involved beyond team</li> <li>• 1 = Some evidence that staff members are involved but this has occurred in an informal manner with no formal ongoing process for involvement</li> <li>• 2 = Formal meeting processes are scheduled in advance and documentation is gathered by team describing how staff members are involved in decision making</li> </ul>

## Interview guidance

"Tell us what your team has done to assess readiness and build consensus among people at your organization? (e.g., using the Person-Centered Organizational Development Tool)"





## Example Score of 0

- Meeting minutes and action plan suggest no organizational structure in place to build consensus around initiatives

## Example Score of 1

- Ad-hoc surveys from the past two years represent efforts to connect staff to new initiatives

## Example Score of 2

- Staff surveys of one type or another are sent prior to every staff meeting to gauge input on important current and future issues



## 1.4 - Consensus Building and Staff Decision-Making: For Consideration

- **Is there an organizational structure in place to build consensus around initiatives, including staff in this process**
  - Not about whether staff are "bought in"
- **For county TOETs**
  - Similarity expected here w/providers



# Activity: Teaming

## Quarters 1 & 2 Incident Report Team Meeting 2/1/22

- **Present:** Jack T., Deanna P., Terrence L., Bobbie R., Sarah W.
- **Not Present:** Pat F., Amir L., Tyler S.

### Agenda

- Incident trend report – data updated through January 2022
- Discuss gaps to agency crisis plan, and brainstorm solutions



# Activity: Teaming

## Quarters 1 & 2 Incident Report Team Meeting 2/1/22

- **Present:** Deanna P. (CEO), Bobbie R. (DSP), Terrence L. (PBS Facilitator), Jack T. (PC Coach), Sarah W. (HR)
- **Not Present:** Pat F. (PC Coach), Amir L. (DSP), Tyler S. (family member)
- **Meeting Facilitator:** Terrence L.
- **Note Taker:** Bonnie R.
- **Time Keeper:** Jack T.

### Agenda

- Approve minutes from 1/5/22
- Incident trend report – data updated through January 2022
- Discuss gaps to agency crisis plan, and brainstorm solutions
- Next meeting: 3/1/22



# Section 2

## **UNIVERSAL PERSON CENTERED PRACTICES**



# 1.5 - Organizational Alignment

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Vision and mission for organization clearly states person-centered values and/or outcome statements are shared as link to person-centered values</li></ul>	<ul style="list-style-type: none"><li>• Vision and mission statements</li><li>• Action planning tasks used to align vision and mission</li><li>• Outcome statements and related documents</li><li>• Units/departments/divisions one-page description to identify their own mission, vision and values statements. Includes everyone in the unit not just team.</li><li>• Action statements indicating the process for mission and vision revisions organization wide.</li></ul>	<ul style="list-style-type: none"><li>• 0 = No clear alignment of vision or mission statements to person-centered practices and no plan for improvement</li><li>• 1 = Vision and mission do not refer to person-centered practices, but a plan is in place to establish person-centered mission/vision statements or outcomes statements are person-centered.</li><li>• 2 = Vision and mission statement include person-centered language and outcomes aligned with outcome statements and action plan</li></ul>

## Interview guidance

"Show us your vision and mission statement. How are they aligned with person-centered values?  
How are your team's outcome statements aligned with these?"



# 1.5: Organizational Alignment

## Example Score of 0

- The organization wide vision and mission statements do not reflect person centered values and the team does not have a current action plan.

## Example Score of 1

- While the organization wide vision and mission statements do not reflect person centered values, the current action plan includes steps the team is taking to revise the mission and vision statements.

## Example Score of 2

- Review of the organization wide vision and mission statements clearly include PC language. OR divisions or departments within the county have vision or mission statements that reflect PC values.



# 1.5 Organizational Alignment: Considerations

- **For county TOETs**

- There is often a County level vision/mission and there might be a longer process for making revisions at this level. Look into the divisions involved with PC/PBS (e.g., justice, human services) as the divisions might have their own unique vision/mission.





Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>• Policies and procedures addressing person-centered thinking and planning are in place</li> </ul>	<ul style="list-style-type: none"> <li>• Policies and procedures</li> <li>• Evidence that tools are used to support staff or coordinate effective supports</li> <li>• Action plan showing steps to adapt policies and procedures</li> <li>• Action statements indicating the process for mission and vision revisions organizational wide.</li> <li>• Members of team participate in organizational policy change workgroups/committees</li> <li>• Person centered values incorporated into supervisory role: 1:1 meetings, performance reviews, professional advancement and development.</li> </ul>	<ul style="list-style-type: none"> <li>• 0= No mention of person-centered practices mentioned in policy documents.</li> <li>• 1=Some indirect references to person-centered practices are included in at least one document</li> <li>• 2 = Policy examples clearly state how person-centered practices are implemented within the organization</li> </ul>

## Interview guidance

"How are person-centered practices evident in your policies and procedures?"



# 1.6 Policy Alignment

## Example Score of 0

- Organization wide policy does not yet reflect PCT language, however this is an action item on the current action plan.

## Example Score of 1

- PCT has been incorporated into the pilot program training protocol and orientation packet. The team is working on expanding the reach of policy alignment.

## Example Score of 2

- Review of the handbook indicates includes a mission, vision, and standards of excellence aligned with PCT language. Policy forms have been updated to include PCT language. Microsoft teams is used to share policies throughout the organization.



# 1.6 Policy Alignment: Considerations

- **For County TOETs**
  - This can be a challenging item for Counties as most policies come from DHS. Look for within division or department policies that reflect person-centered practices.



# 1.7 - Universal Person-Centered Strategies

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Specific person-centered strategies and tools are actively used in at least two settings (observations are completed in at least one setting, coaching and mentoring systems are outlined and monitored)</li></ul>	<ul style="list-style-type: none"><li>• Direct Observation data</li><li>• Coaching and mentoring schedules</li><li>• Profiles are available for staff and people supported</li><li>• Coach interviews</li><li>• Examples used at Division/unit meetings; Case Manager meetings with people they support; Trainings/community outreach events; First contact (phone calls, intake, reception, assessment)</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no evidence that staff members are actively using universal tools</li><li>• 1 = Some evidence is available indicating that universal PC tools are used in at least one setting</li><li>• 2 = Universal tools are used across two settings and system is in place for mentoring and coaching staff members</li></ul>

## Interview guidance

"How are person-centered strategies used in your organization, and in which settings are they used?  
Are systems in place for mentoring or coaching staff in these practices?"



### Example Score of 0

- Priority for use of PC tools is included in the action plan but not actively implemented at this time.

### Example Score of 1

- Team reports that PC tools (e.g., personal profile) are used with staff and people supported in at least two homes, but the team has not developed out (or has temporarily suspended) any direct observation in these settings.

### Example Score of 2

- Team reports that PC tools (e.g., personal profile) are used with staff and people supported in two homes. The team provides examples of personal profiles, shares direct observation data from one home. The team also shares examples of coaching schedules in these homes (e.g., coaching provided by core team to supervisors and DSPs)



# 1.7 Universal Person Centered Strategies: Considerations

- **Scoring Considerations:**
  - Clarify that two settings are documented with at least one observed by external TOET facilitator
  - add some specific examples of person-centered strategies to Possible Data Sources
  - include some examples of strategies and staff/coaches knowing the specific strategies that are observed
  - Going beyond general person centered
  - Training considerations/tools: sample observation tools that can be used
  - Define setting – this may be the same home, especially for a small provider, or different homes, or home / vocational
- **For County TOETs**
  - This can be a challenging item for Counties as most policies come from DHS. Look for within division or department policies that reflect person-centered practices.



# 1.8 - Active Staff Support

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Staff members indicate support for actively using universal person-centered strategies.</li></ul>	<ul style="list-style-type: none"><li>• Meeting Minutes</li><li>• Action Plan</li><li>• Voting Results</li></ul>	<ul style="list-style-type: none"><li>• 0 = No evidence that staff support person-centered practices</li><li>• 1 = At least two staff indicate support for organization-wide planning is in place</li><li>• 2= Documentation and interviews indicate all staff members in pilot area have had a chance to indicate level of support with 80% or more in favor of PC practices</li></ul>

## Interview guidance

"How have you assessed staff support of person-centered practices in the area(s) where you are implementing? "



# 1.8 Active Staff Support

## Example Score of 0

- While the team supports PC practices, they have not asked staff in pilot areas about their support for PC practices.

## Example Score of 1

- Team members report support for PC practices and the house supervisor and one DSP in the pilot site indicate support for PC practices.

## Example Score of 2

- The team reports having provided an overview for all staff in the pilot area and collecting information regarding staff buy-in for PC practices using an anonymous poll (yes/no). Results indicate that 92% of the staff were in favor of PC practices.

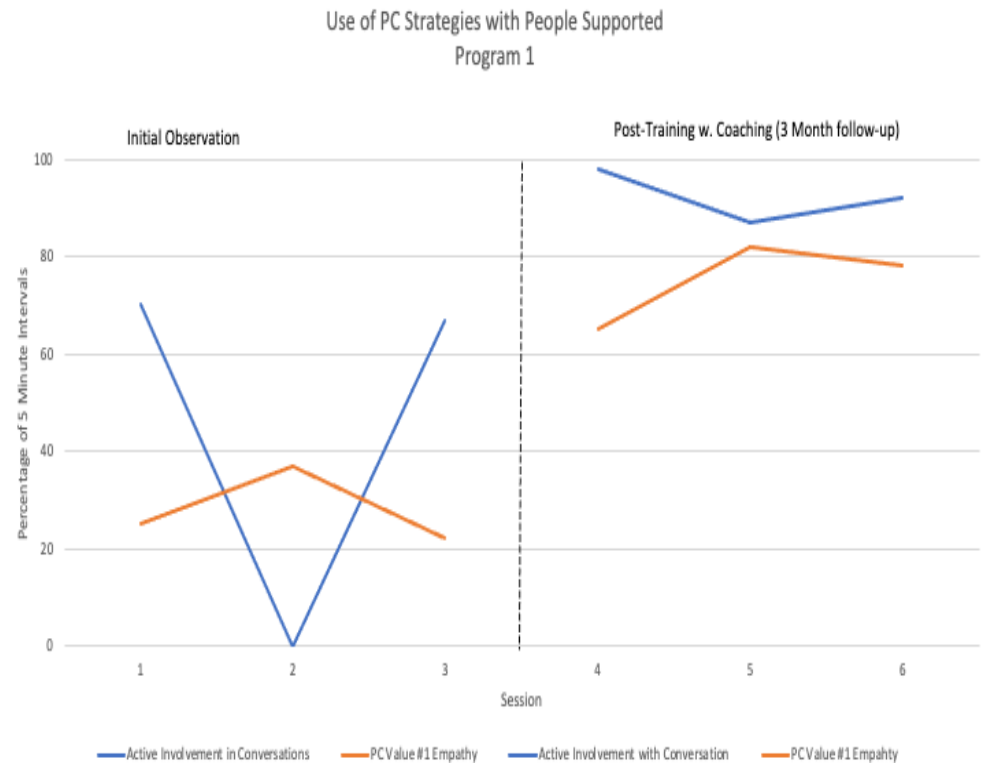




# Activity: Universal Person-Centered Strategies

Review the following information. How would you use this information to score item 1.7?

- Team shares that staff have been trained in PC strategies
- Supervisors have been trained to (a) observe DSPs and (b) provide specific feedback to DSPs
- Supervisors used the Direct Observation Tool within the TOET
- Team uses direct observation data to action plan coaching and support



## Example: Active Staff Support

Given the following information, how would you score each scenario for item 1.8?

### Scenario #1

- The team uploaded a copy of their universal PC strategies PPT and PD calendar to the drive for TOET evidence.
- The PD calendar shows when PC overviews were provided to staff.
- The team also uploaded the results of a survey given to all supervisors and DSP indicating over 83% are in favor of PC practices.

### Scenario #2

- The team has provided an overview of PCT to all staff. In discussions with staff in one home, one of the core team members learned that the house supervisor and one of the DSPs is in favor of PCT. The team added to their action plan the need to survey more staff to better understand buy-in.



# Section 3

## **UNIVERSAL POSITIVE BEHAVIOR SUPPORT**



# 1.9 - Organizational Policy Alignment

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Policies and procedures addressing positive behavior support and describing the importance of building positive social environments that promote higher quality of life for both people supported and staff members within the organization</li></ul>	<ul style="list-style-type: none"><li>• Policies and procedures</li><li>• Action plan</li><li>• Minutes of supervisory meetings, performance reviews</li><li>• Mission and vision documents</li><li>• Minutes of organizational leadership meetings</li><li>• Values / skills matrix</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no evidence that the organization is addressing the need to promote positive social interactions</li><li>• 1 = Some evidence that policies and procedures align with the need for promoting positive social interactions</li><li>• 2 = Policy examples clearly state how PBS is used within the organization to promote quality of life for people supported and staff members</li></ul>

## Interview guidance

"Tell us about your policies and practices for building positive social environments."



### Example Score of 0

- PBS values are not present in mission or vision statements, and are not reflected in policy or staffing documents.

### Example Score of 1

- Mission and vision statements are value-consistent with PBS but policy and staffing documents do not assure these values are systematically incorporated into the operations of the organization.

### Example Score of 2

- Policy exists that specifically references the development and nurturance of positive social environments; performance reviews document the incorporation of staff quality of life into the review process.



## 1.9 - Organizational Policy Alignment: For Consideration

- **For county TOETs**

- Working with other social workers within the division, more so than working with the providers
- Acknowledge that counties do not have as much wiggle room to change policy language / procedure
- Teams focus on embedding / weaving PBS within standing procedures (rather than policy)
- Are there actions taken to ensure procedures reflect best PC/PBS practices?
- May reflect in vision/mission statements for departments or divisions



# 1.10 - Positive Social Interactions and Skills

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Specific universal PBS strategies are created with the direct involvement of everyone within the setting, and plan for practicing and teaching positive social skills is clearly described. Plan for expanding implementation across organizational settings is documented</li></ul>	<ul style="list-style-type: none"><li>• PBS resources available for all staff to use during support delivery, meetings, etc</li><li>• Calendar schedule for practicing PC skills</li><li>• Written plans for teaching and practicing skills</li><li>• Interviews</li><li>• Direct observations</li><li>• Values / skills matrix</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no evidence that positive social interactions have been identified, taught, or practiced in any setting</li><li>• 1 = Some evidence shows that positive social interactions are being identified, taught, and practiced</li><li>• 2 = Interviews, observations, and written documentation clearly show that positive social interaction plans are being implemented in at least one setting within the organization</li></ul>

## Interview guidance

"Have you identified organizational values and behavioral expectations in any settings in your organization? How do you teach positive social skills, and what is your plan for expanding these skills across the organization?"



# 1.10 - Positive Social Interactions and Skills: Scoring Examples

## Example Score of 0

- Matrix examples from residence homes and from departmental units indicate values have been identified but specific skills have not been tied to those values, and support strategies to promote skills are not evident.

## Example Score of 1

- Interviews and direct observations indicate that positive social interactions are valued by staff and leadership, and regularly observed, but not systematically included in support delivery, meetings, or inservice trainings

## Example Score of 2

- Department meeting minutes show a monthly “PBS Skills Review” item in which a different antecedent, teaching, or reinforcement approach is reviewed and practiced to promote social skills among staff and among people using supports.





## 1.10 - Positive Social Interactions and Skills: For Consideration

- **This item is about staff focusing on PC values in their work**
  - e.g., matrix/values and teaching
- **For county TOETs**
  - Some internal policies may touch on social interaction (e.g., diversity policy)
  - Can be limitations on this, given other policy directives
  - Matix for meetings is a good example, improving culture in the building via committee work
  - Are the elements of a matrix shared with social workers/others you support via consultation? Consider info sharing agreements.



# 1.11 - Positive Feedback and Acknowledgment

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Strategy for recognizing staff and people supported for positive social interactions is articulated and implemented in areas of organization where PBS is implemented</li></ul>	<ul style="list-style-type: none"><li>• Interviews</li><li>• Written plan for recognizing and acknowledging positive social interactions</li><li>• Website</li><li>• Newsletter</li><li>• Employee of the month</li><li>• Dedicated category in performance reviews or staff unit meetings</li><li>• Thank you cards</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no evidence that feedback and acknowledgement is used to support implementation</li><li>• 1 = Some evidence shows that positive feedback and acknowledgements are provided but these strategies are not directly connected to a plan for increasing social interactions</li><li>• 2 = Interviews, observations, and written documentation clearly show that there is a clear plan for providing positive feedback and acknowledgement in areas where PBS is implemented</li></ul>

## Interview guidance

"How do you acknowledge the behaviors that you want to see in your organization?"



### Example Score of 0

- Interviews, written communications, and permanent products indicate little to no positive feedback given, formally or informally.

### Example Score of 1

- Some indication of the presence of positive feedback and acknowledgment (e.g., employee of the month) but without evidence of it being woven into expectations of the supervisory relationship or workplace culture.

### Example Score of 2

- Unit meetings have monthly examples of positive acknowledgement of staff for specific reasons, performance reviews have a dedicated category, and interviews indicate a cultural norm of positive feedback.



## 1.11 - Positive Feedback and Acknowledgment: For Consideration

- **This should have day-to-day presence in supervision/coaching**
- **For county TOETs**
  - Different committees may have a role –
    - Connection to matrix
    - Connection to supporting social workers who reach out
    - Connection to culture of organizational practice



# 1.12 - Consistent response to problems that occur

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Definitions are in place that clearly outline behaviors that are considered incidents that need to be documented and minor issues that do not require documentation. Strategy for teaching staff members how to respond to minor problems is in place.</li></ul>	<ul style="list-style-type: none"><li>• Behavioral definitions</li><li>• Training materials</li><li>• Behavior definitions within the Matrix</li><li>• Code of Conduct Policy</li><li>• Onboarding training incorporates these definitions and strategies</li><li>• Organizational process in place defining incidents, conflict and the positive support response rooted in the culture of trust.</li><li>• Systematic feedback loop process with positive regard and trust</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no evidence that definitions and training materials are in place</li><li>• 1 = Some work has been completed to establish behavioral definitions and train staff</li><li>• 2 = The behavioral definitions and training materials are in place with a plan to train all staff members over time</li></ul>

## Interview guidance

"How do you respond to problems that occur in your organization?"



## 1.12 - Consistent response to problems that occur: Scoring Examples

### Example Score of 0

- Interviews, training materials, and policy documents reflect little to no alignment across the organization with regard to the definition of problems, or how staff are trained to address and document them.

### Example Score of 1

- Competency-based staff training is in place to address problems, though no policies are in place to guide review of data regarding problems / incidents, and the types or levels of problems / incidents themselves are not defined.

### Example Score of 2

- Staff training materials reflect systematic training and support for responding to problems, which are well defined and delineated, and are addressed monthly via data review at leadership meetings.



## 1.12 - Consistent response to problems that occur: For Consideration

- **Key is staff focus on PC values in their work – coming back to matrix/values and teaching**
- **For county TOETs**
  - Different committees may have different roles regarding matrix, supporting others, supporting organizational practice
  - Individuals may have expertise in certain areas but may not cross over to align approaches
  - Develop matrix to address problems when brought to the team – increase consistency
  - Develop range of examples to articulate different approaches to addressing problems (e.g., Culture of Trust)



## ACTIVITY-a: Which item would this newsletter piece connect to? What else would you want to know prior to assigning a score for this item?



**Coaches Corner:** As part of BCS' commitment to ongoing training, some of us recently attended a workshop on "Finding Friends in the Community". Relationships with others, friends, are essential to all humans in order to thrive. As direct support staff, one of our many duties is to help the people we support in their efforts to develop and maintain relationships with others. We might start out by doing a relationship map that shows who is already a friend, as well as people that the person supported may want involved in their life more, and we can support the person in building that relationship. If one compares a relationship map of staff with one for a person supported, which shows more friends? Why? Where do we find these friends and how did the relationship get started? One way may be as simple as going to the same place repeatedly over time, gradually interacting with someone there, until the two of you become friends (this is over-simplified, of course). Through brainstorming different categories at the workshop, we came up with quite an extensive list of possible places and groups that could potentially lead to making a friend. These lists will be shared with all the houses so watch for them. Here are a few samples to get your own brainstorming going:

- Musical: Drum circles, church choirs, open mic nights
- Cultural Groups: Diversity Council, Castle Community, Greek fest
- Service groups: Habitat for Humanity, Summer of Service, Adopt a Highway
- Spiritual groups: Churches, yoga, AA
- Hobby clubs: Red Hat Society, Community Garden, horse clubs
- Sports teams/leagues: Darts, broom ball, disc golf
- Outdoor groups/activities: Silver Lake rentals, camps, The Running Room

Find out ideas of what people you support like and then expand on that to try new things until you hit on something they really enjoy; go often. There may be someone there who shows an interest in the person with whom they can strike up a friendship and a meaningful, lasting relationship.





# ACTIVITY-b: Which item would this internal communication connect to? What else would you want to know prior to scoring this item?

## Notes from Internal Team wide- February 2020 (pre-pandemic)

### How to improve communication across the agency:

- Look for the positive throughout all positions and from all levels- Up, down and across.
- Promote Company Bucks delivery
- Build relationships
- Build understanding
- Remember Grace
- Remember Humility
- Create clear expectations (Especially with new staff)
- Make sure all sides of the story are heard before making judgement and stick to the facts
- Change the culture of “this is how we have always done it”
- Get clarity on the Community Based Service Manual
- A more helpful DHS “Helpdesk” would be nice
- Create more standardized training across the programs and positions
- Make sure people show up for what is being offered already
- Make sure people are freed up to attend what is offered already
- Overhaul how we get shifts covered so people can be engaged in what is being offered
- Hold each other accountable to follow through on expectations
- Hold yourself accountable to follow through on expectations



# Section 4

## **CULTURAL AWARENESS AND COMPETENCE STRATEGIES**



# 1.13 - Active Recruitment

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• The organization actively seeks out staff members from diverse backgrounds and promotes cultural competency in hiring practices</li></ul>	<ul style="list-style-type: none"><li>• Marketing and recruitment tools</li><li>• Action Plan</li><li>• Internal training materials related to recruitment.</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no indication that the organization actively recruits people from diverse backgrounds or has an evaluative system for hiring demographics in place.</li><li>• 1 = Some strategies are used for marketing and/or evaluation of the hiring demographics.</li><li>• 2 = There are marketing strategies and ongoing evaluation of demographics of staff members hired.</li></ul>

## Interview guidance

"Tell us about how you recruit staff, and do you use any targeted marketing strategies to hire staff from diverse backgrounds? If so, tell us about them."



# 1.13- Active Recruitment

## Example Score of 0

- The team is unaware of the recruitment and hiring efforts. The team plans to add this to their action plan and will seek HR representation on the team.

## Example Score of 1

- The team connected with HR and received information regarding marketing and recruitment efforts to promote diversity in employment practices. While there are marketing efforts, the team has not engaged with data on hiring practices.

## Example Score of 2

- The HR representative on the team provides examples of marketing and recruitment strategies that are used to promote diversity in hiring practices. This includes internal training related to recruitment. HR provides the team with frequent data reports on the demographics of staff members hired. The team reviews these data during team meetings and these data inform PBS/PC action planning.



# 1.14 - Cultural Acceptance

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• People report that their cultural viewpoints are recognized and celebrated, and ongoing assessment is in place</li></ul>	<ul style="list-style-type: none"><li>• Interviews</li><li>• Surveys</li><li>• Incident report summaries</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no indication that the organization assesses perceptions of cultural acceptance</li><li>• 1 = Cultural viewpoints is assessed but the information gathered is informal or limited</li><li>• 2 = A systematic way to gather information about everyone's cultural viewpoints is used, and there are attempts to recognize and celebrate cultures</li></ul>

## Interview guidance

"What strategies or training materials do you use to increase cultural awareness and responsiveness?"



# 1.14 - Cultural Acceptance

## Example Score of 0

- The team reports an organizational priority for understanding the range of cultural diversity of people but has not taken action at this time.

## Example Score of 1

- Efforts to understand the range of diversity are in place in certain programs or groups within the organization.

## Example Score of 2

- The team conducts annual surveys with all staff to gather information about cultural viewpoints and demographics. Surveys are anonymous. Data are reviewed by the team and used to develop plans to highlight and celebrate the range of diversity within the organization. The team shared a cultural events calendar.



# 1.14 - Cultural Acceptance: Considerations

- Getting to this level of information can be a challenge
- If interviewing the BIPOC community, make sure surveys are anonymous
  - Gather demographics on workers at different levels of the organization (e.g., leadership through DCP)
  - Including the most representative group to participate in the TOET



Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>• There are strategies and training materials in place to increase cultural awareness and responsiveness.</li> </ul>	<ul style="list-style-type: none"> <li>• Interviews</li> <li>• Agenda and events scheduled with staff members</li> <li>• Curriculum for cultural responsiveness in place</li> <li>• Action plan</li> </ul>	<ul style="list-style-type: none"> <li>• 0 = There is no indication that the organization has a plan to build cultural awareness and responsiveness</li> <li>• 1=People interviewed report that cultural awareness and responsiveness training is addressed but no formal plan for expanding cultural competence is in place</li> <li>• 2 = Increasing cultural awareness and responsiveness is a priority within the organization, with an action plan in place to increase cultural responsiveness and to promote skills in this area.</li> </ul>

## Interview guidance

"How do you assess people's perceptions of cultural acceptance, and how do you use the information you collect? In what ways do you recognize and celebrate cultural diversity?"





### Example Score of 0

- The team has not taken action at this time. OR the team is unaware of HR's actions at this time.

### Example Score of 1

- Cultural awareness and responsiveness trainings are held throughout the year. Team shares organization PD calendar that lists trainings and dates.

### Example Score of 2

- Cultural awareness and responsiveness trainings are held throughout the year. Team shares organization PD calendar that lists trainings and dates. Additionally, the current action plan includes follow-up activities to promote skills and coaching strategies to support people who are not performing to standards.



# Activity: Cultural Awareness and Competence Strategies

Use the following information to identify (a) the item that can be scored and (b) the score you would provide.

## Professional Development Calendar:

Month	Topic
January	Exploring Culture
February	Implicit bias and microaggressions
March	Cultural competence & cultural humility
April	Racial and ethnic identity development
May	Equity versus equality, diversity versus inclusion
June	Building relationships within the community



# Section 5

## **MONITORING PLANS AND ORGANIZATION- WIDE DATA FOR DECISION MAKING**



Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>• Tenure, retention, staff satisfaction data and other related workforce measures are reviewed in team meetings to assess progress</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting minutes</li> <li>• Data summaries</li> <li>• Interviews</li> <li>• Sample of staff satisfaction surveys</li> </ul>	<ul style="list-style-type: none"> <li>• 0 = There is no indication that the organization is using data related to tenure, retention, or other staffing patterns</li> <li>• 1 = Interviews with team members indicate that retention/tenure data are reviewed during team meetings – should this also include language of “other staffing patterns”</li> <li>• 2 = Meeting minutes, data summaries, and other evidence indicates the team regularly reviews data for decision making</li> </ul>

### Interview guidance

"Which tenure, retention, and staff satisfaction data about your workforce do you collect and review? What do you do with the data?"



## 1.16 - Organizational Workforce: Scoring Examples

### Example Score of 0

- No records are kept regarding employee retention, turnover, or other staffing patterns. Little to no indication that staff satisfaction data are collected or used.

### Example Score of 1

- Annual review template indicates staff satisfaction data are collected, but no evidence those data have driven changes to policy or staff retention efforts.

### Example Score of 2

- Staff training materials, and organizational leadership meetings, reflect review of annual staff satisfaction surveys and graphs on employee retention.



## 1.16 - Organizational Workforce: For Consideration

- **For county TOETs**
  - Similar expectations to provider organizations



# 1.17 - Data-Based Decision Making

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• The organization-wide team reviews outcomes associated with effective planning (quality of life, changes in incident reports, 911 calls, injuries, restraint, etc.) on a regular basis to make data-based decisions –</li></ul>	<ul style="list-style-type: none"><li>• Quality of life surveys, interviews</li><li>• Incident report data, injuries, etc.</li><li>• Fidelity data</li><li>• Meeting minutes</li><li>• Assessment dashboard</li><li>• Human Resources hiring data collection process</li><li>• File Review using regulatory guidelines to inform organizational decisions</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no indication that the team is regularly reviewing data during meetings</li><li>• 1 = Interviews with team members indicate that at least one type of data are reviewed (incidents, county strategic evaluation data, attrition, etc.)</li><li>• 2 = Meeting minutes, data summaries, and other evidence indicates the team regularly reviews data for decision making</li></ul>

## Interview guidance

"How do the data you collect inform your team's practices?"



## 1.17 - Data-Based Decision Making: Scoring Examples

### Example Score of 0

- The team collects some information including on incident reports and quality of life, but there is no evidence the data are reviewed regularly or used for decision making.

### Example Score of 1

- Team meeting records suggest leadership reviews quality of life data occasionally, but policy and training documents indicate limited changes are driven by these data reviews.

### Example Score of 2

- Annual revisions of policies and staff training materials include updated quality of life benchmarks for people supported and for staff. These benchmarks are then used in leadership meetings when reviewing quarterly QoL data.





## 1.17 - Data-Based Decision Making: For Consideration

- **For county TOETs**
  - Counties may get different data than organizations – and may get the data from external sources (e.g., 911 call data)
  - Counties may not get incident report data since agencies are only required to send it to the state
  - Counties may send satisfaction surveys, or set up booth in the lobby, or other creative ways to gather data important to them for making decisions



### Feature

- Team reviews fidelity data (self-assessment tools, tiered onsite data) during regular team meetings and makes adjustments according to the data.

### Possible Data Sources

- Meeting minutes
- Summary of self-assessment and past onsite data

### Scoring

- 0 = There is no indication that the team is regularly reviewing fidelity data during meetings
- 1 = Interviews with team members indicate that fidelity data are reviewed during meetings
- 2 = Meeting minutes, data summaries, and other evidence indicates the team regularly reviews fidelity data for decision making

## Interview guidance

"How does your team use fidelity data? How do these influence your team's practices?"



## 1.18 - Ongoing Monitoring of Fidelity Data: Scoring Examples

### Example Score of 0

- Interviews indicate fidelity of implementation is a familiar concept to staff, and there is a shared understanding of its importance, but no evidence exists of systematic measurement or use of fidelity data by leadership.

### Example Score of 1

- Leadership team meeting minutes indicate a monthly placeholder for review of fidelity data, but more than half of the minutes indicate the topic was tabled / not discussed.

### Example Score of 2

- Data on fidelity of implementation of all support plans are reviewed monthly by team leads, which is reflected in quarterly leadership meeting minutes and subsequent revisions to staff training materials.



## 1.18 - Ongoing Monitoring of Fidelity Data: For Consideration

- **Consider system level fidelity vs. specific practice fidelity**
- **For county TOETs**
  - Audit reviews can inform practices.
  - There may be some processes internal to divisions that could incorporate the TOET as a fidelity tool re: processes and practices.



# 1.19 - Annual Evaluation

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Team conducts an annual summary and review of overall progress each year documenting major accomplishments, data collected, and products developed and disseminated</li></ul>	<ul style="list-style-type: none"><li>• Meeting minutes</li><li>• Summary of data collected</li><li>• Documented changes in action plan linked to review</li><li>• Evidence that review is shared (newsletter, handouts, awards and recognition, etc.)</li><li>• Interviews</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no indication that the team reviews implementation progress annually</li><li>• 1 = Interviews suggest annual evaluation occurs</li><li>• 2 = A summary of annual evaluation data is available in presentations or report form.</li></ul>

## Interview guidance

"Tell us about your team's practices to evaluate your progress each year. How do you share this information with people?"



## 1.19 - Annual Evaluation: Scoring Examples

### Example Score of 0

- Interviews with staff, and reviews of the action plan and its regular updates, indicate that fidelity data are not used annually to drive decisions at the system or individual level.

### Example Score of 1

- Action plan and its regular updates suggest that fidelity data are reviewed annually, but no evidence that decisions or action plan updates are driven by the data.

### Example Score of 2

- Interviews, action plan documents, and staff recognition documents indicate annual reviews of fidelity data take place, and that staff are publicly acknowledged for high fidelity of implementation.



## 1.19 - Annual Evaluation: For Consideration

- **For county TOETs**

- Consider that all departments, divisions, and the agency as a whole may have their own strategic plans.
- These may be reviewed at a senior management level – which we would want to know about in a TOET review.



## Feature

- Team member collects direct observation data in at least two locations quarterly.

## Possible Data Sources

- Summary of data
- Completed observation forms

## Scoring

- **0** = There is no indication that the team is regularly reviewing observation data during meetings
- **1** = Interviews suggest observation data are collected
- **2** = Data collected are organized and available for review with summaries organized for meetings

## Interview guidance

"How does your team use observation data? How are these data summarized?"





## 1.20 - Direct Observation: Scoring Examples

### Example Score of 0

- Team meeting minutes indicate that direct observation data are not requested from team leads and not discussed, though decisions are made in the absence of the data.

### Example Score of 1

- Observation data are available and used per meeting minutes, but a limited amount of data – sometimes single observations – are the basis for training and clinical decisions.

### Example Score of 2

- Leadership meeting minutes include graphs of direct observation data, narrative summaries of the data coupled with staff interview data, and summaries of the training decisions made based on those data.



## 1.20 - Direct Observation: For Consideration

- **Identify existing opportunities for observations:**
  - During meetings observe for PC language (using PC observation tool or existing Matrix)
  - Interactions – phone observation, reception interactions with people
- **For county TOETs**
  - Think about interactions with the community – first contacts with people who reach out – are doors opened?
  - MNChoices assessors, Rule 79 assessors...are these interactions ever observed to assess for the elements of PC/PBS practices?
  - Can be emphasis on supporting agencies to do well with this area of practice, utilizing resources.



# 1.21 - Universal Quality of Life Assessment

## Feature

- Team summarizes existing quality of life data to assess universal status within the organization, or uses surveys or other methods to review quality of life across people as part of both ongoing monitoring and as an annual review

## Possible Data Sources

- Surveys, interviews, etc.
- Other documentation
- Quality of life surveys for staff and people supported through agency
- Incorporate quality of life measures into current organization-wide data collection methods.

## Scoring

- 0 = There is no indication that the team is collecting quality of life data
- 1 = Interviews suggest quality of life data are collected
- 2 = Data collected are organized and available for review with summaries organized for meetings and summarized annually

## Interview guidance

"How does your team use quality of life data? How are these data summarized?"



### Example Score of 0

- No quality of life assessments or staff satisfaction surveys are found in available files.

### Example Score of 1

- Interviews and available files indicate quality of life assessments are done annually with people using supports, but the data are not reflected in individual or organizational planning documents.

### Example Score of 2

- Quality of life data are summarized for each person so each year's scores are visually comparable to scores in prior years. Individual support plans and annual meeting documents reference these QoL scores.



## 1.21 - Universal Quality of Life Assessment: For Consideration

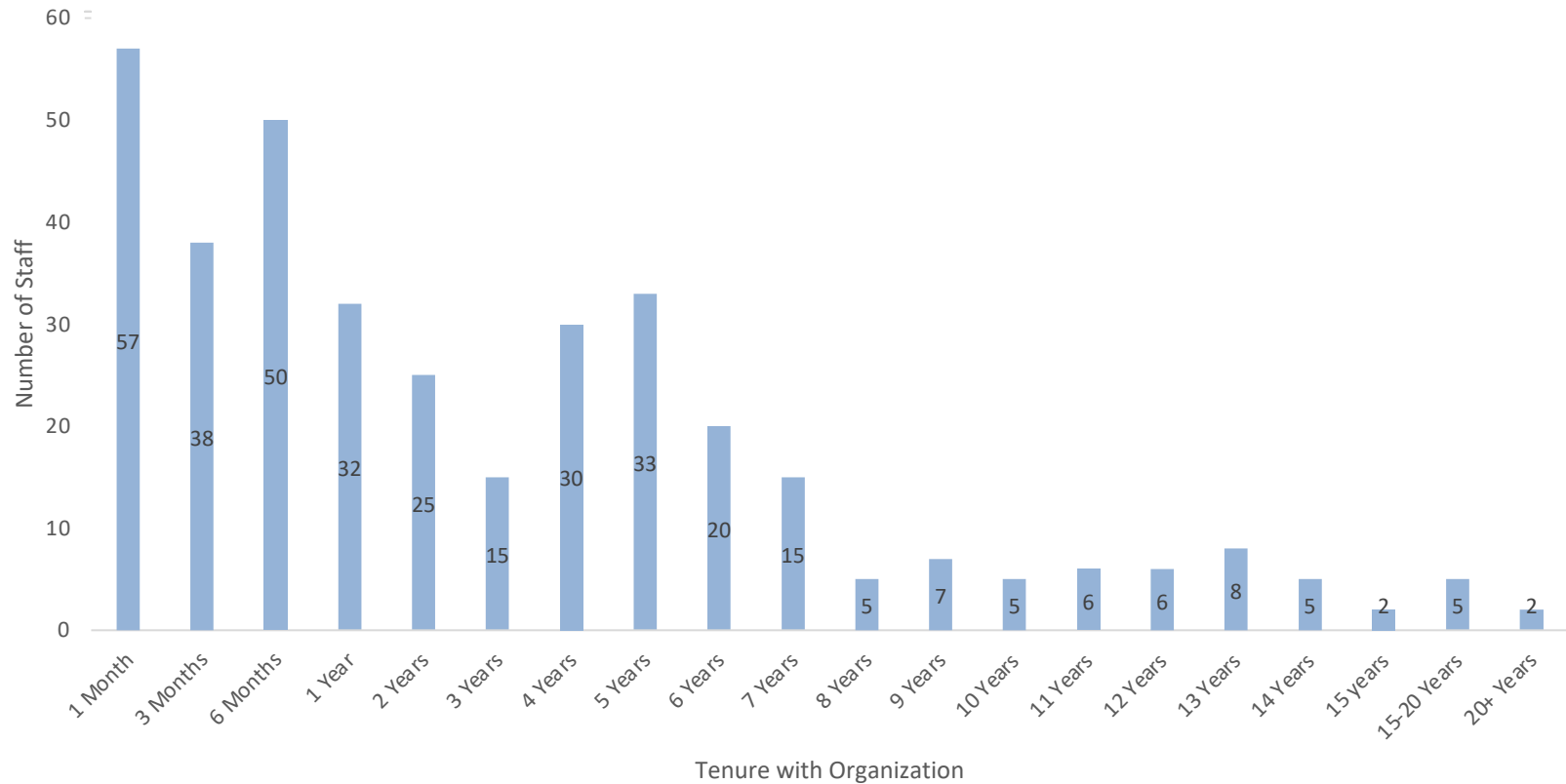
- **For county TOETs**

- MNChoices, semi-annual LTSS review, and Rule 79 evaluation covers these kinds of things.
- Lead workers often audit individual files to ensure process with these assessments.
- Staff satisfaction and quality of life important to capture, perhaps surveys re: work location flexibility, what can be done to improve things; listening sessions to talk about your work / improvements within the division.
  - Differentiate between true QOL assessment and satisfaction survey.

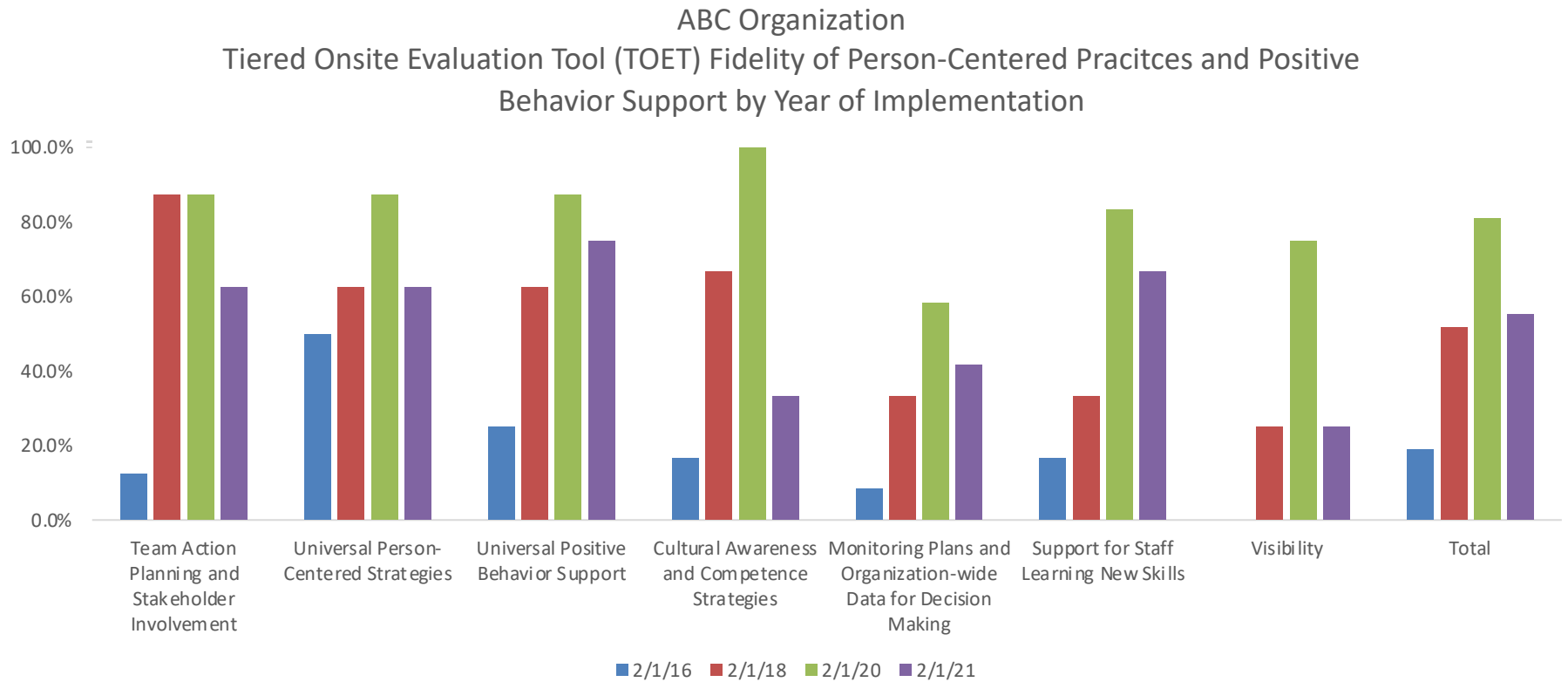


# ACTIVITY-a: Which item would these data connect to? What else would you want to know prior to assigning a score for this item?

Retention Data for 2021



# ACTIVITY-b: Which item would these data connect to? What else would you want to know prior to assigning a score for this item?



# Section 6

## **SUPPORT FOR STAFF LEARNING NEW SKILLS**





Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>• Strategies for collecting, summarizing &amp; reviewing data on staff performance across curriculum related to person-centered practices and PBS</li> </ul>	<ul style="list-style-type: none"> <li>• Monitoring systems for staff development</li> <li>• Data summarizing training efforts</li> <li>• Observation data</li> <li>• Case/file reviews or leadership/coach observation with staff</li> <li>• Performance review including survey feedback from peers, partners and person's served</li> <li>• Evidence of competencies being achieved</li> </ul>	<ul style="list-style-type: none"> <li>• 0 = There is no indication that staff development systems are in place to monitor person-centered thinking/planning and PBS</li> <li>• 1= Interviews with staff/records indicate that some staff development is in place for PC practices and PBS</li> <li>• 2 = Procedures, competency-based training schedules, and summaries of staff performance data show that both person-centered practices and PBS staff development efforts are in place</li> </ul>

## Interview guidance

"What professional development opportunities are in place for your staff? How is instruction in person-centered practices and positive behavior supports included in these opportunities?"



# 1.22 - Staff Development and Competency Based Training

## Example Score of 0

- No formal monitoring of PC and PBS staff development systems. Training has occurred, but the team is not collecting and reviewing data related to staff performance in the areas of PC and PBS.

## Example Score of 1

- Team reports ongoing staff development in PC and PBS. Case file reviews are completed and there are PBS and PCT consultation meetings. However, no data are collected regarding these activities.

## Example Score of 2

- Team reports ongoing staff development in PC and PBS. Case file reviews are completed and there are PBS and PCT consultation meetings. Data are captured during case file reviews and data summaries are reviewed during team meetings to inform action planning.



# 1.23 - Universal Person-Centered Strategies

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Evidence that person-centered strategies are actively used and coaches and other staff receive support learning to integrate strategies and tools into everyday routines and processes</li></ul>	<ul style="list-style-type: none"><li>• Schedule of coaching specific staff members</li><li>• Number of coaches available</li><li>• Survey results showing perception of coaches' using tools</li><li>• Interviews</li><li>• Coaching support: coaches' community of practice, coaches' corner</li><li>• SharePoint coaches' folders are actively used (use data as to the frequency of access of these resources)</li><li>• Mentoring: onboarding training and ongoing learning</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no indication that universal person-centered strategies and tools are actively used</li><li>• 1 = Interviews suggest that staff are receiving active coaching for the use of universal person-centered strategies and tools</li><li>• 2 = Schedules for organizing and monitoring coaching/training of staff members are documented and coaches meet to problem solve and support each other</li></ul>

## Interview guidance

"How are coaches involved in supporting learning to integrate person-centered strategies and tools into everyday routines and practices?"



### Example Score of 0

- Coaching support has not been built out at this time.

### Example Score of 1

- Supervisors are trained as coaches and can support staff throughout the day (on-the spot). The coaching expectations are less formal (on an as-needed basis). The team provides the number of staff trained as coaches. Coaches do not meet to problem solve, and the team does not have a suggested schedule for on-going coaching (proactive vs. reactive).

### Example Score of 2

- Person centered strategies have been trained and there are coaches in place to support staff implementation. Team provides a schedule of coaches' meetings and coaching activities. Coaches' resources are available via SharePoint and data are collected and reviewed regarding the frequency of access to these resources.



Feature
<ul style="list-style-type: none"> <li>• The organization can access universal person-centered trainers to provide training to staff and community members. Access may be to trainer(s) within organization, or in collaboration with regional partners</li> </ul>

Possible Data Sources
<ul style="list-style-type: none"> <li>• Number of universal person-centered trainers available within organization or regionally</li> <li>• Number of staff receiving universal person-centered training</li> </ul>

Scoring
<ul style="list-style-type: none"> <li>• 0 = There is no evidence that the organization can access universal person-centered trainers</li> <li>• 1 = Interviews indicate sufficient trainers are available</li> <li>• 2 = The organization maintains training for all staff members and addresses new staff training for introductory universal person-centered events with 50% of staff actively trained</li> </ul>

## Interview guidance

"Can you access sufficient Person-Centered Trainers for your organization's needs? How many staff have attended universal person-centered training events?"



### Example Score of 0

- The organization does not have internal PC trainers nor does the team have access to external/regional PC trainers.

### Example Score of 1

- The organization has access to 3 regional PC trainers but has been unable to provide training to 50% or more of the staff.

### Example Score of 2

- PC training is provided to all staff, and is provided for all new staff with refreshers for existing staff. The organization has 3 PC trainers. The team provided documentation that 98% of all staff have been trained on PC practices.



# 1.24 - Universal Person Centered Trainers

- Scoring Considerations:
  - Size of agency can make a difference
  - Smaller providers might not have their own PCT trainers
  - Smaller providers may turn to DHS



# 1.25 - Coach Trainers

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• The organization can access coach trainers (staff who help introduce key concepts and tools) to provide support staff members learning new skills. Access may be to trainer(s) within organization, or in collaboration with regional partners</li></ul>	<ul style="list-style-type: none"><li>• Number of coach trainers available within organization or regionally</li><li>• Types of coaches are identified and defined (person-centered coaches, key contacts, etc.)</li><li>• Number of coaches trained</li></ul>	<ul style="list-style-type: none"><li>• 0 = There is no evidence that the organization can access Coach Trainers</li><li>• 1 = Interviews indicate sufficient Coach Trainers are available for practices implemented (person-centered, positive behavior support, etc.)</li><li>• 2 = The organization maintains training for coaches and provides evidence that there is an adequate number of coaches available for implementation efforts</li></ul>

## Interview guidance

"Can you access sufficient Coach Trainers for your organization's needs?"





# 1.25 - Coach Trainers

## Example Score of 0

- The organization is working on identifying regional coaches while they begin to build internal capacity to train and support coach trainers.

## Example Score of 1

- The organization does not have any coaches' trainers on staff, but they work with another organization to get access to coach trainers.

## Example Score of 2

- The organization has 15 coach trainers on staff and the organization maintains training for coaches. Evidence from Appendix B outline the number and types of coaches.



# 1.25 - Coach Trainers

- Scoring Considerations:
  - Engage in questions regarding threshold for 'enough' capacity given the goals and needs of people supported.
  - Counties and providers may be looking to DHS for support in accessing and building capacity.
  - Some providers and counties would send people to training to develop capacity.



Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>• Organization has access to enough person-centered planners to support people in need of individualized planning processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of person-centered plans completed within organization</li> <li>• Number of person-centered plans (either within organization or regionally)</li> <li>• SharePoint contains list of person-centered planners available and how to access them.</li> <li>• Agency staff know where to find information on how to fund person centered planning services (CBSM, SharePoint person centered planners folder, agency web based internal resource directory)</li> <li>• Tips and tricks on when a person-centered plan can be useful and how to write plans that are person centered (available on web based internal resource directory)</li> </ul>	<ul style="list-style-type: none"> <li>• 0 = There is no evidence that the organization can <u>access</u> person-centered planners</li> <li>• 1 = Interviews indicate sufficient access to person-centered planners are available for the organization (access for planning)</li> <li>• 2 = The organization can access person-centered planning trainers to maintain a sufficient number of planners for the need within the organization</li> </ul>

## Interview guidance

"Can you access sufficient Person-Centered Planners for your organization's needs?"



### Example Score of 0

- Team reports that staff know there are PC planners available through the DHS list, but are not sure how to access PC planners. The team indicated intent to identify a process by which staff know how to access PC planners.

### Example Score of 1

- Team provided evidence of access to PC planners through DHS.

### Example Score of 2

- The team provided evidence of having 3 PC planners on staff and this meets their organization needs.



# 1.26 - Person Centered Planners

- Scoring Considerations:
  - Counties and providers may hire this out on a waiver instead of developing internal capacity. Team should be able to provide evidence of access to external Person Centered Planners.



Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"> <li>•Organization has access to enough PBS facilitators to support people in need of individualized planning processes.</li> </ul>	<ul style="list-style-type: none"> <li>•Number of PBS plans completed within organization</li> <li>•Number of PBS Facilitators (either within organization or regionally)</li> <li>• SharePoint (or web- based internal resource directory) contains list of PBS facilitators available and how to access</li> <li>•Agency staff know where to find information on how to fund PBS services (CBSM, SharePoint person centered planners folder, agency web based internal resource directory)</li> <li>•Tips and tricks to identify when more intensive PBS strategies are needed and what those strategies are and where to find them. (available on web based internal resource directory)</li> <li>•File/case note review showing evidence of positive supports at universal level</li> </ul>	<ul style="list-style-type: none"> <li>•0 = There is no evidence that the organization can access PBS Facilitators</li> <li>•1 = Interviews indicate sufficient access to PBS Facilitators are available for the organization</li> <li>•2 = The organization can access PBS Facilitator trainers to maintain a sufficient number of PBS Facilitators in the organization or region</li> </ul>

## Interview guidance

"Can you access sufficient Positive Behavior Support Facilitators for your organization's needs?"



## Example Score of 0

- Team is unaware of how to access PBS Facilitators at this time.

## Example Score of 1

- Team has access to regional PBS Facilitators and currently has 25 PBS plans (of varying intensity).

## Example Score of 2

- The team provided evidence of having 3 trained PBS facilitators within the organization. The team has 3 additional staff going through PBS facilitator training.



# 1.27 - Positive Behavior Support Facilitation

- Scoring Considerations:
  - Counties often hire out for PBS Facilitation and often look for DHS/CSS for support.
  - Providers may build internal capacity or find external PBS Facilitators.
  - Engage in questions regarding threshold for 'enough' capacity given the goals and needs of people supported.





# Activity: Support for Staff Learning New Skills

Using the information provide, identify (a) what item(s) you could score, (b) the score for the item(s), and (c) any additional information to help with scoring.

## Appendix B: Team Capacity Measurement Tool

How many total staff are currently employed in your organization (number of employees, not FTE)?

Total Staff in Organization (Number of People, not FTE)	110
---	-----

How many staff in your organization are involved in the following roles?

Number of staff trained = The total number of staff trained since you began work in TIPPS. Include all staff who have discontinued working on your organization's team and those who have left your organization.

Number of staff currently active on your team = The total number of staff who are currently participating in your organization's team efforts.

+

	Number of Staff Trained	Number of staff Currently Active on Team
Person-Centered Coaches	20	5
Person-Centered Coach Trainers	3	3
Person-Centered Thinking Trainers	3	3
Person-Centered Planners	6	4
Key Contacts	5	2
Positive Behavior Support Facilitators	3	1

How many trainers or contractors have provided these services for staff or people in your organization **since the last TOET?**

Number of trainers of contractors = People who provide these services but are not on your organization's regular payroll (i.e., they are not a regular weekly employee in your organization).

	Number of trainers or contractors
Person-Centered Thinking Trainers	7
Universal Person-Centered Coach Trainers	2
Person-Centered Planners	2
Positive Behavior Support Facilitators	3



# Section 7

## **VISIBILITY**



### Feature

- Team shares progress and summary data to stakeholders regularly

### Possible Data Sources

- Meeting minutes
- Newsletters, Website, or other communications
- Copies of presentations
- Annual report to community.
- Internal feedback loop process created to obtain information from stakeholders and community as well as share information with them

### Scoring

- 0 = No evidence indicates the team has organized opportunities to share information and celebrate successes
- 1 = Interviews indicate that the team has shared information with some stakeholders
- 2 = Evidence indicates that the team shares information and celebrates success with all stakeholders regularly

## Interview guidance

"How do you celebrate and share information with stakeholders? When do you do this?"



### Example Score of 0

- No evidence found on website, in newsletters, annual reports, or interviews that information is shared – or positive news is celebrated - externally in systematic ways .

### Example Score of 1

- Quarterly updates to the Board of Directors indicate information and celebrations are shared with that group, though no other shareholders appear to receive this news systematically.

### Example Score of 2

- Interviews, newsletters, website, and annual gala program indicate that information and celebrations are widely shared across stakeholders.



## 1.28 - Celebration and Information Sharing: For Consideration

- **For county TOETs**

- Television in the lobby to share information / celebrations
- Going out and talking with different agencies (e.g. Duluth police)
- Sharing about processes to bring information where it needs to be.
- Reports to county board which is public information.
- Other examples could be newspaper articles, trade periodicals.



# 1.29 - Introductory Training in Universal PBS Available for Key Stakeholders and Community Members

Feature	Possible Data Sources	Scoring
<ul style="list-style-type: none"><li>• Staff as well as other stakeholders in the community are introduced to key elements of universal practices (online trainings, presentations, group action planning)</li></ul>	<ul style="list-style-type: none"><li>• Presentations</li><li>• Schedule of PBS trainings</li><li>• Summary of people trained</li><li>• Community outreach</li><li>• Onboarding training</li><li>• Formal mentoring and consultation system in place</li><li>• PBS facilitators as coaches</li><li>• Internal feedback loop process created to obtain information from stakeholders and community as well as share information with them</li></ul>	<ul style="list-style-type: none"><li>• 0 = No evidence is available to indicate that the team has organized introductory presentations for staff and other stakeholders</li><li>• 1 = Some evidence is available indicating that staff and other stakeholders have an opportunity to learn about practices</li><li>• 2 = There is a regular schedule or process for presenting information about universal practices to staff members and other stakeholders</li></ul>

## Interview guidance

"What opportunities are there for people across the community to learn about positive support practices that your organization is implementing? What methods do you use for this, and what data do you have on who accesses/attends? "



### Example Score of 0

- No evidence found on website, in newsletters, annual reports, or interviews that introductory presentations are made available to staff or external stakeholders.

### Example Score of 1

- Annual treatment plan review meeting minutes for people indicate brief introductory training is often offered to staff and stakeholders in the context of that meeting.

### Example Score of 2

- Website and training records indicate quarterly introductory trainings are offered for stakeholders and staff (interviews confirm that senior staff or administrators cover shifts for new staff to attend training).



## 1.29 - Introductory Training in Universal PBS Available for Key Stakeholders and Community Members: For Consideration

- **What makes sense for your organization and community of stakeholders regarding the regularity of offered trainings?**
- **What role will PBS Facilitators play in stakeholder training?**
- **For county TOETs**
  - Training providers (small and large)
  - Reaching out to school districts to send people out to trainings  
Training for jails.
  - Discuss PC practices during invited talks with different groups/organizations.
  - Send the message that we are listening, we are communicating, dispel myths about the role of the county, instill partnership perspective.





**ACTIVITY:** Which item would this slide from a presentation to the Board of Directors connect to? What else would you want to know prior to scoring this item?

## Status Update

- Board presentation on PCT/PBS completed in August 2021
  - Reviewed PCT/PBS Team's vision, mission, goals, and action plan
- Program Coordinators, Coaches, and Administrative staff attended the 2 day person centered training.
- Currently piloting three recognition practices with aim to obtain feedback from each department to inform how to expand recognition agency-wide.
- Created a resource folder for staff to review examples of how Person Centered Tools are developed and how they can be utilized.
- TOET completed with UMN ICI Staff in February 2021



TOET

**SCORING, GRAPHING, AND REPORTING**



# Scoring The TOET Subscales

- Score Subscales
  - Sum of each subscale divided by the total possible points for the subscale, multiplied by 100

Subscale	Items	Score
Team Action Planning and Stakeholder Involvement	1.1 – 1.4	= _____ /8 x 100 = _____%
Universal Person-Centered Practices	1.5 - 1.8	= _____ /8 x 100 = _____%
Universal Positive Behavior	1.9 – 1.12	= _____ /8 x 100 = _____%
Cultural Awareness and Competence Strategies	1.13 – 1.15	= _____ /6 x 100 = _____%
Monitoring Plans and Organization-wide Data for Decision Making	1.16 – 1.21	= _____ /12 x 100 = _____%
Support for Staff Learning New Skills	1.22 – 1.27	= _____ /12 x 100 = _____%
Visibility	1.28 – 1.29	= _____ /4 x 100 = _____%



# Scoring The TOET Subscales

- Score Subscales

Subscale	Items	Score
Team Action Planning and Stakeholder Involvement	1.1 – 1.4	= <u>7</u> /8 x 100 = <u>87.5</u> %
Universal Person-Centered Practices	1.5 - 1.8	= <u>8</u> /8 x 100 = <u>100</u> %
Universal Positive Behavior	1.9 – 1.12	= <u>7</u> /8 x 100 = <u>87.5</u> %
Cultural Awareness and Competence Strategies	1.13 – 1.15	= <u>5</u> /6 x 100 = <u>83.3</u> %
Monitoring Plans and Organization-wide Data for Decision Making	1.16 – 1.21	= <u>8</u> /12 x 100 = <u>66.67</u> %
Support for Staff Learning New Skills	1.22 – 1.27	= <u>9</u> /12 x 100 = <u>75</u> %
Visibility	1.28 – 1.29	= <u>3</u> /4 x 100 = <u>75</u> %



# Calculating TOET Total Score

Teams that score above 70% are approaching full implementation

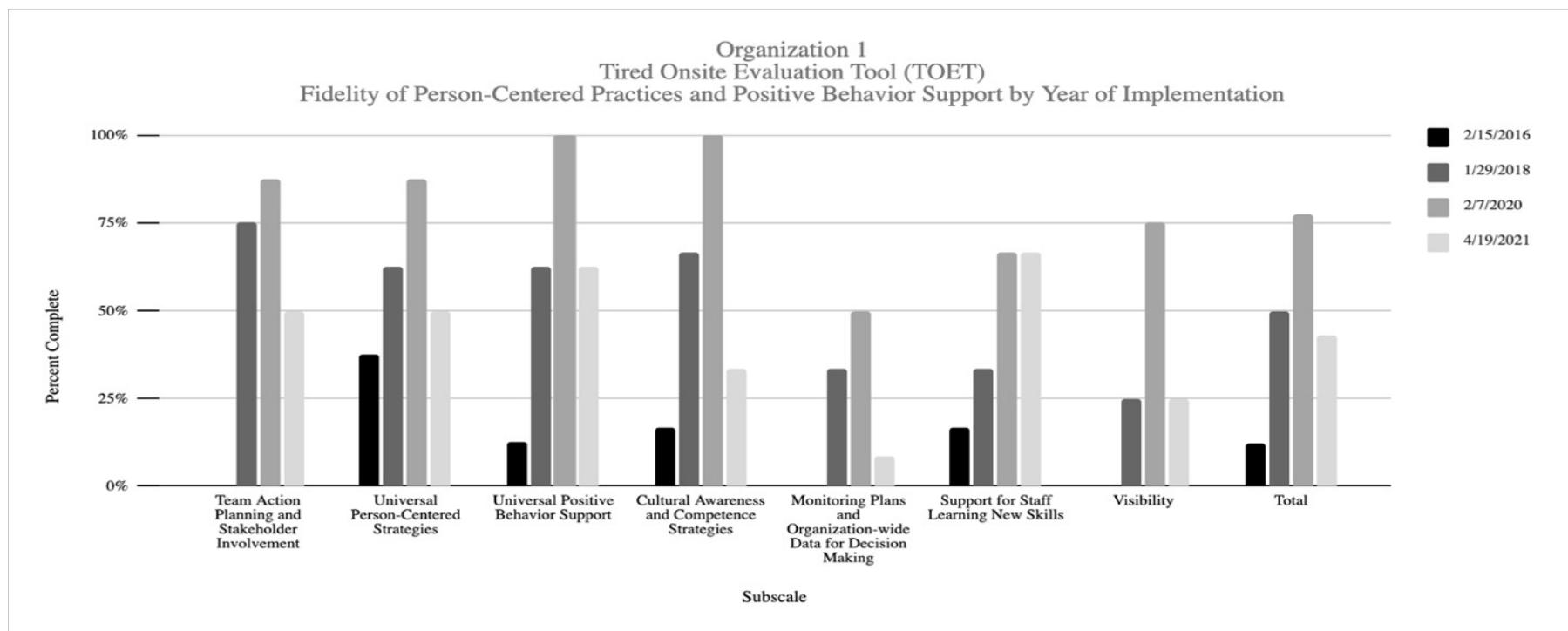
- Total Score
  - Total items scores divided by 58 (total possible points for the TOET) multiplied by 100

Subscale	Items	Score
Team Action Planning and Stakeholder Involvement	1.1 – 1.4	= <u>7</u> / 8 x 100 = <u>87.5</u> %
Universal Person-Centered Practices	1.5 - 1.8	= <u>8</u> / 8 x 100 = <u>100</u> %
Universal Positive Behavior	1.9 – 1.12	= <u>7</u> / 8 x 100 = <u>87.5</u> %
Cultural Awareness and Competence Strategies	1.13 – 1.15	= <u>5</u> / 6 x 100 = <u>83.3</u> %
Monitoring Plans and Organization-wide Data for Decision Making	1.16 – 1.21	= <u>8</u> / 12 x 100 = <u>66.67</u> %
Support for Staff Learning New Skills	1.22 – 1.27	= <u>9</u> / 12 x 100 = <u>75</u> %
Visibility	1.28 – 1.29	= <u>3</u> / 4 x 100 = <u>75</u> %
<b>Total Score</b>	<b>1.1 - 1.29</b>	= <b><u>47</u></b> / 58 x 100 = <b><u>81</u></b> %



# Graphing Results

- Excel is an efficient way to graph TOET results over time



# Setting Up Excel

Item and Subscale	2/12/18	2/28/19	2/2/20	2/15/21	Possible Points
1.1 Team Composition	1	2	2	1	
1.2 Team Effectiveness	0	2	2	1	
1.3 Stakeholder Involvement	0	2	2	2	
1.4 Consensus Building and Staff Decision Making	0	1	1	1	
<b>Team Action Planning and Stakeholder Involvement</b>					8
1.5 Organizational Alignment	1	1	2	1	
1.6 Policy Alignment	0	1	2	2	
1.7 Universal Person-Centered Strategies	2	2	2	1	
1.8 Active Staff Support	1	1	1	1	
<b>Universal Person-Centered Strategies</b>					8
1.9 Organizational Alignment	1	1	2	1	
1.10 Positive Social Interactions & Skills	0	1	1	1	
1.11 Positive Feedback & Acknowledgement	1	2	2	2	
1.13 Consistent Response to Challenges that Occur	0	1	2	2	
<b>Universal Positive Behavior Support</b>					8
1.13 Active Recruitment	0	2	2	0	
1.14 Cultural Acceptance	0	1	2	1	
1.15 Cultural Awareness and Competence	1	1	2	1	
<b>Cultural Awareness and Competence Strategies</b>					6
1.16 Organizational Workforce	1	0	1	0	
1.17 Data Based Decision Making	0	2	2	1	
1.18 Fidelity Data	0	0	1	0	
1.19 Annual Evaluation	0	1	2	2	
1.20 Direct Observation	0	1	1	2	
1.21 Universal Quality of Life Assessment	0	0	0	0	
<b>Monitoring Plans and Organization-wide Data for Decision Making</b>					12

Subscales and Total Scores	2/1/16	2/1/18	2/1/20	2/1/21
Team Action Planning and Stakeholder Involvement	12.5%	87.5%	87.5%	62.5%
Universal Person-Centered Strategies	50.0%	62.5%	87.5%	62.5%
Universal Positive Behavior Support	25.0%	62.5%	87.5%	75.0%
Cultural Awareness and Competence Strategies	16.7%	66.7%	100.0%	33.3%
Monitoring Plans and Organization-wide Data for Dec	8.3%	33.3%	58.3%	41.7%
Support for Staff Learning New Skills	16.7%	33.3%	83.3%	66.7%
Visibility	0.0%	25.0%	75.0%	25.0%
<b>Total</b>	<b>19.0%</b>	<b>51.7%</b>	<b>81.0%</b>	<b>55.2%</b>



# Summarizing Results

- Providing a written summary with a graph is helpful
- For each item:
  - Briefly summarize discussion and review of documents
  - Provide score for the item
  - Provide considerations for growth to inform action planning



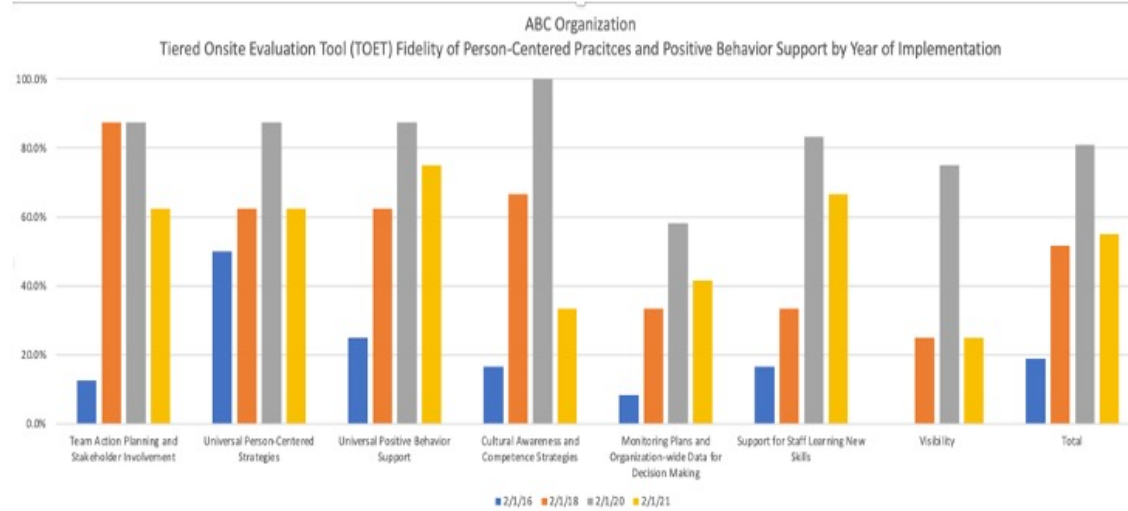


# Summarizing Results: Example

## Tiered Onsite Evaluation Tool (TOET) Summary Form

Organization/County: ABC Organization

Date: February 1, 2021



### Universal Primary Person-Centered Practices and Positive Behavior Support

#### Subscale: Team Action Planning and Stakeholder Involvement

Feature	Possible Data Sources	Scoring Criteria
<b>1.1 Team Composition:</b> Working team composition includes administration, key contact(s), universal person-centered (PC) coaches, and practice expertise, PBS expertise, human resources, management, and direct staff	<ul style="list-style-type: none"> <li>Organizational chart or documentation</li> <li>Meeting Minutes</li> <li>Interviews</li> </ul>	0 = Team exists but roles are not represented  <b>1 = Team exists but some key team members do not attend, or attend less than 80% of the meetings</b>  2 = Team members representing key roles attend over 80% of meetings

Notes: A teams has been established but does not include representation of all roles (e.g., no DSPs or HR on the team). There was DSP representation prior to the COVID pandemic. The team is not meeting as regularly as they have in the past. The goal is to resume regular meetings and include DSP representation and include HR on the team.



# The importance of **INTEROBSERVER AGREEMENT**



# Do you see what I see?

- Interobserver agreement is a requirement for anyone wanting to facilitate TOETs external to their organization (and otherwise is a best practice)
- Two raters score each item independently
- Tally agreements
- Divide agreements by the total number of items (29), then multiply by 100
  - e.g., 27 agreements / 29 items = 0.9310
    - $\times 100 = 93.1\%$  agreement
- 80% agreement is an expected minimum
  - If under 80% contact ICI and consider getting retrained on the TOET



# Next Steps



# Action Planning for TOET Organizational Leads

- Work with organization leadership to schedule TOET for your organization
  - Familiarize leadership and colleagues with TOET and scoring
  - Document your reliability on TOET scoring with others – connect with ICI staff to schedule co-facilitation of your TOET
    - Tim Moore (moore618@umn.edu)
- Stay tuned for additional training opportunities to become a TOET Facilitator who can lead the TOET external to your organization



**THANK YOU!**

It has been a pleasure working with you today and we are eager to see you again for further TOET training soon

