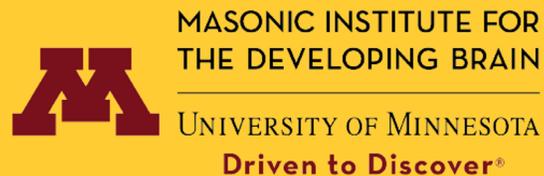




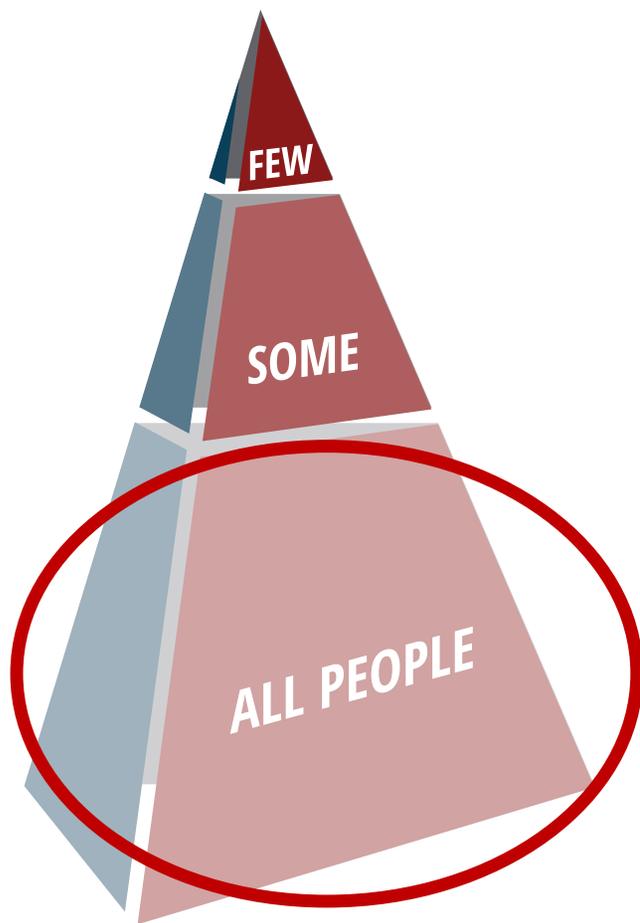
UNIVERSITY OF MINNESOTA
Driven to DiscoverSM

Minnesota's Tiered Onsite Evaluation Tool (TOET)

Rachel Freeman



Measuring Tier 1 in Provider Organizations



- Changes in person-centered interactions
- Positive social interactions taught, modeled and reinforced
- Evidence that policies and procedures have changed
- Data-based decision making systems used
- Systems for new staff training and ongoing coaching and supervision

Creating a Common Language

Minnesota's Standards of Practice: Positive Behavior Support Across the Lifespan

Visit the Standards of Practice

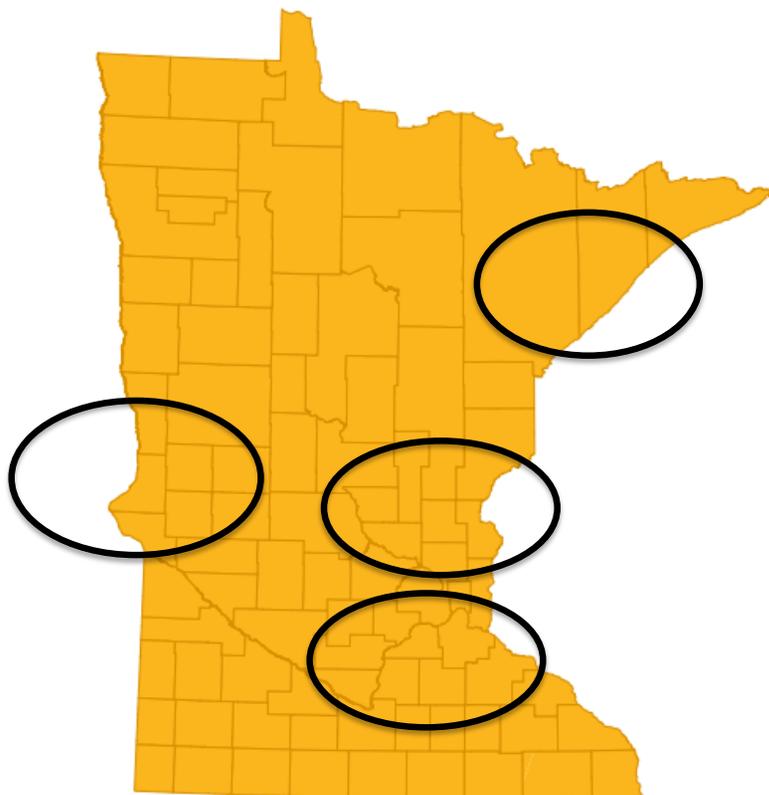


Minnesota Statewide Organization-Wide Training Infrastructure

Training Layers

- Team Training (T1)
- PCT Trainers/Coach Training (T1)
- Picture of a Life Planners/Trainers
- PBS Facilitators

Cohort 2B



Cohort 1 & 2A



Cohort 1 & Cohort 4



Cohort 3 & 4

Teams Trained = 32
Teams with TOET = 25
Organizations = 12



Tiered Onsite Evaluation Tool (TOET)

Key Characteristics

- 2-4 Hours Onsite Visit to Organization
- Outside Evaluation of Implementation
- Review of Documentation
- Interviews
- Observations

TOET Fidelity Includes Monitoring Data-Based Decision Making

Evaluation Questions-Teams

Efforts Taken

- Coaches, Key Contacts. PBS Facilitators
- Homes, Areas of Organization (parameters)

Fidelity

- Self-Assessment
- Onsite Evaluation

Outcomes

- Quality of Life
- Incident Reports
- Injuries, Sick Days
- Attrition/Retention, Workers Compensation

Examples of Evaluation Measures

- # key contacts
- # of active coaches
- TOET (external evaluation)
- MN Team Checklist (self-assessment)
- Quality of life measures
 - Individual
 - Summary across organization
- Incident reports, injuries, restraint
- Sick leave, attrition/retention workers compensation
- Climate scales staff and people supported
- Surveys of cultural responsiveness

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Name

PC3.pdf

PBS Training Manual On-boarding.pdf

PC4.JPG

Staff evaluation form.docx

XYZ one page profile.pdf

FINAL Universal TOET.docx

2021 Outcome data .xlsx



Teams Upload evidence prior to TOET Meeting

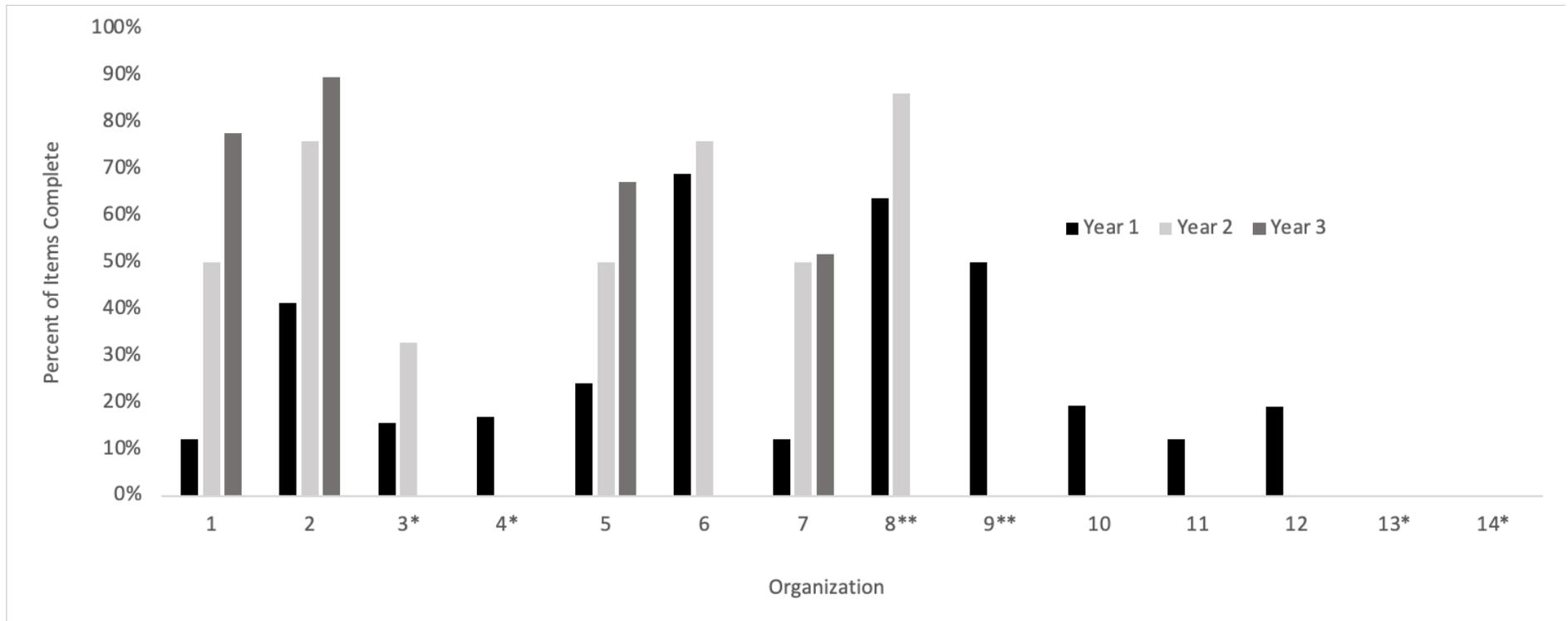
Overview of Tiered Onsite Evaluation Tool (TOET) Subscales and Items

TOET Subscale	Number of items	Items	Sample scoring and types of evidence
1. Team Action Planning/Staff Involvement	4	1.1 Team Composition, 1.2 Team Effectiveness, 1.3 Stakeholder Involvement, 1.4 Consensus Building and Staff Decision Making.	<p>1.1 Team Composition: Working team composition includes administration, key contact(s), universal person-centered (PC) coaches, and practice expertise, PBS expertise, human resources, management, people receiving services and family, and direct staff</p> <p>Evidence: Organizational chart or documentation, Meeting Minutes, Interviews</p> <p>Scoring: <i>0</i> = Team exists but roles are not represented; <i>1</i> = Team exists but some key team members do not attend, or attend less than 80% of the meetings; <i>2</i> = Team members representing key roles attend over 80% of meetings</p>
2. Universal Person-Centered Practices	4	1.5 Organizational Alignment, 1.6 Policy Alignment, 1.7 Universal Person-Centered Strategies, 1.8 Active Staff Support.	<p>1.5 Organizational Alignment: Vision and mission for organization clearly states person-centered values and/or outcome statements are shared as link to person-centered values</p> <p>Evidence: Vision and mission statements, Action planning tasks used to align vision and mission, Outcome statements and related document, Units/departments/divisions one-page description to identify their own mission, vision and values statements. Includes everyone in the unit not just team, Action statements indicating the process for mission and vision revisions organization wide.</p> <p>Scoring: <i>0</i> = no clear alignment of vision or mission statements to person-centered practices and no plan for improvement, <i>1</i> = 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, <i>2</i> = Vision and mission statement include person-centered language and outcomes aligned with outcome statements and action plan.</p>

Scoring the TOET

- Implementation points
 - Achieved = 2
 - In progress = 1
 - Not Started = 0
- Criterion for scoring provided for each item
- Percentage of Items Implemented
 - Overall Total
 - ✓ Number of items scored as “Achieved” divided by Total # of items
 - Subscale Scores
 - ✓ Number of items in each subscale area scored as “Achieved” divided by the number of items in that subscale area

TOET Scores Across All Provider Organizations Six+ Years of Implementation



Notes: TOET scores across participating organizations reflecting over six years of participation in TA. Organization 1 is the Case Study example. *Organizations participating that attrited. **Organizations that were part any earlier PC training funded by the state but became actively involved in the cohort model.

Freeman, R., Simacek, J., Jeffrey-Pearsall, J., Lee, S., Khalif, M., & Oteman, Q. (2022). *Development of the Tiered Onsite Evaluation Tool (TOET) for organization-wide person-centered positive behavior support*. Accepted with revisions. *Journal of Positive Behavior Interventions*.

Direct Observation Strategy

Part 1 – Staff Members Observed

PC Practices

- Person-First Language
- Nonjudgmental Language
- Working in Alliance
- Reflective Listening Skills
- Universal Person-Centered Strategies
- Empathic Behaviour

PBS Practices

- Encouraging Social Interaction
- Supporting Choices
- Reinforcing Others

Part 2 – Person Supported Observed

- Active Involvement in Conversations/Meetings/Activities
- Engaging in Identified Social behaviors
- Operational Definitions for...
 - Respect
 - Inclusion
 - Support
 - Empathy

Part 1: Matrix Observation Process

MINNESOTA DIRECT OBSERVATION FORM

Date and Time of Observation: _____ Number of People in the Setting: _____

Setting Observed: _____



Part 1				
<i>Complete Parts 1A and 1B simultaneously during a 20 minute observation period of a selected staff member using the lists below: Mark a plus in the box if you observed an example of the behavior occur within the 5 minutes and write a brief note on what you observed.</i>				
A. Person-Centered Behaviors				
Behavior Observed	Minutes 0-5	Minutes 5-10	Minutes 10-15	Minutes 15-20
Person-First Language	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Nonjudgmental Descriptive Language	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Working in Alliance with the Person	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Reflective Listening Skills	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Person-Centered Behaviors	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Demonstrates Empathic Behavior	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Paraphrasing	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Subtotal Person-Centered Behaviors Observed				_____/24 _____%

Part 2

Are People Actively Using the Social Interactional Skills Considered Important?



MINNESOTA DIRECT OBSERVATION FORM

Date and Time of Observation: _____ Number of People in the Setting: _____

Setting Observed: _____

B. Promoting Social Engagement and Interactions

Part 1

Observe Staff using the list below.

A. Person-Centered Behaviors

Item Observed	Minutes 0-5	Minutes 5-10	Minutes 10-15	Minutes 15-20
Person-First Language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nonjudgmental Descriptive Language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working in Alliance with the Person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reflective Listening Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person-Centered Behaviors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates Empathic Behavior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Subtotal Person-Centered Behaviors Observed _____/24
 _____%

Item Observed	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 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

Item Observed	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"/>

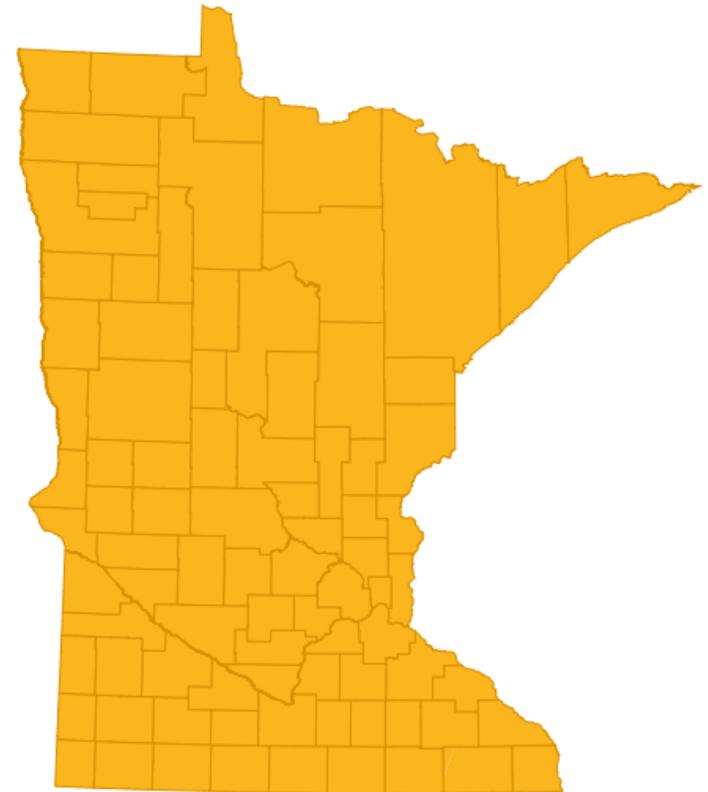
Subtotal Person-Centered Behaviors Observed _____/_____
 _____%

Freeman, R., Watts, E., Reichle, J., Moore, T., Maki, A., O'Neil, S., Baker, D., Amado, A., Proctor, M., & Julian, H. (2016). *Minnesota direct observation and assessment tool*. Minneapolis, MN: Institute on Community Integration, University of Minnesota.

Provider Story of Implementation

Organization Characteristics

- Within city of 85,852 people
- Supporting 77 people, 200 staff members
- Data implementing 2016-2020
- Supports to people with IDD, mental illness, and traumatic brain injury



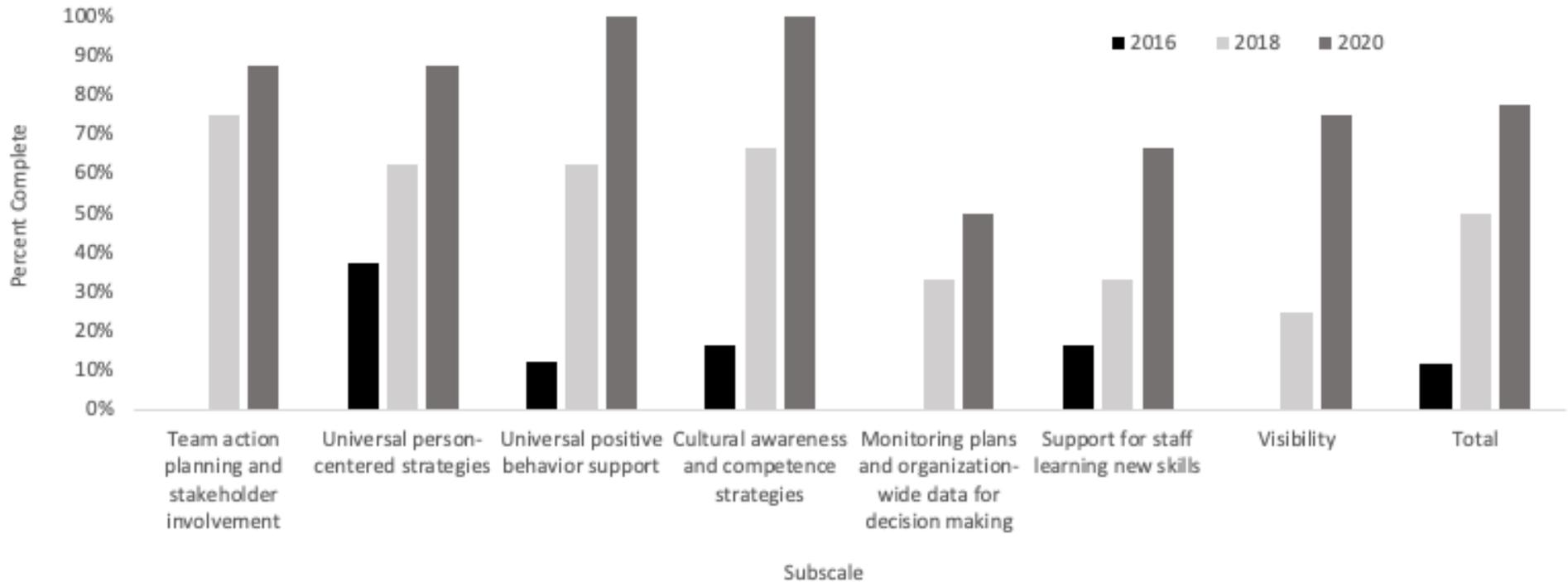
Provider Accomplishments (Brief Review)

Positive Behavior Support Activities

- 12 universal team members meeting regularly
- 30 Coaches taught both PCT tools and PBS to mentor staff
- Targeted “matrix” created in 5 locations within organization
- Created measurement system for incident reports
- Direct observation system piloted connected to supervisory system
- PBS Facilitators & Picture of a Life trained facilitators in training (tiers 2/3)

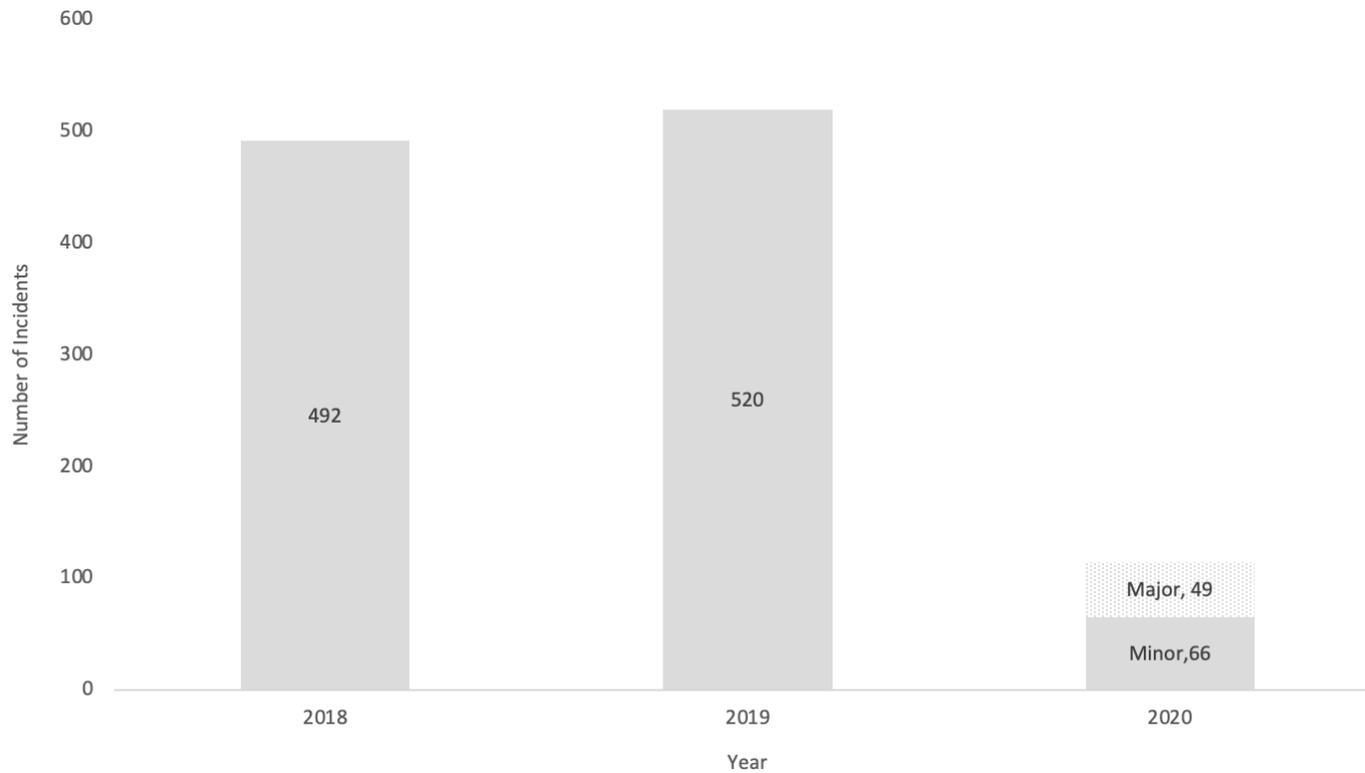
	Cleaning	Meal Prep	Cleaning up After Dinner	Grocery Shopping
Respect	Get chores done on time, before dinner	Say, "thank you". Offer each other compliments on good food.	Honor each other's process, but keep up the timeline.	Tell the other person if you are not going grocery shopping. Watch for other people's feet while driving the cart. Be OK with what the other person picks out.
Kindness	Say, "thank you" or, "that looks good".	Assist each other in looking up new recipes on the tablet.	Ask if help is needed	Learn how to make the grocery list. Do the grocery list together. Pick-up something your roommate might like.
Helpfulness	Maybe get a kudos board. Offer to bring supplies if needed.	Offer to teach each other cooking skills	Rinse your plate. Clear your dishes. Put away someone else's dishes.	Help carry the groceries in from the car. Help make the list.
Communication	Look at the calendar so you don't have to remind each other. Let your great work speak for itself (No need to talk about what you did)	Look at calendar to know what is going on. Learn the likes and dislikes of each other. Ask the likes and dislikes of each other.	Tell each other if you need to switch days.	Tell your roommate if you are not going shopping. Look at the calendar to see whose day it is.

TOET Data From 2016 – 2020 for the Case Study Example



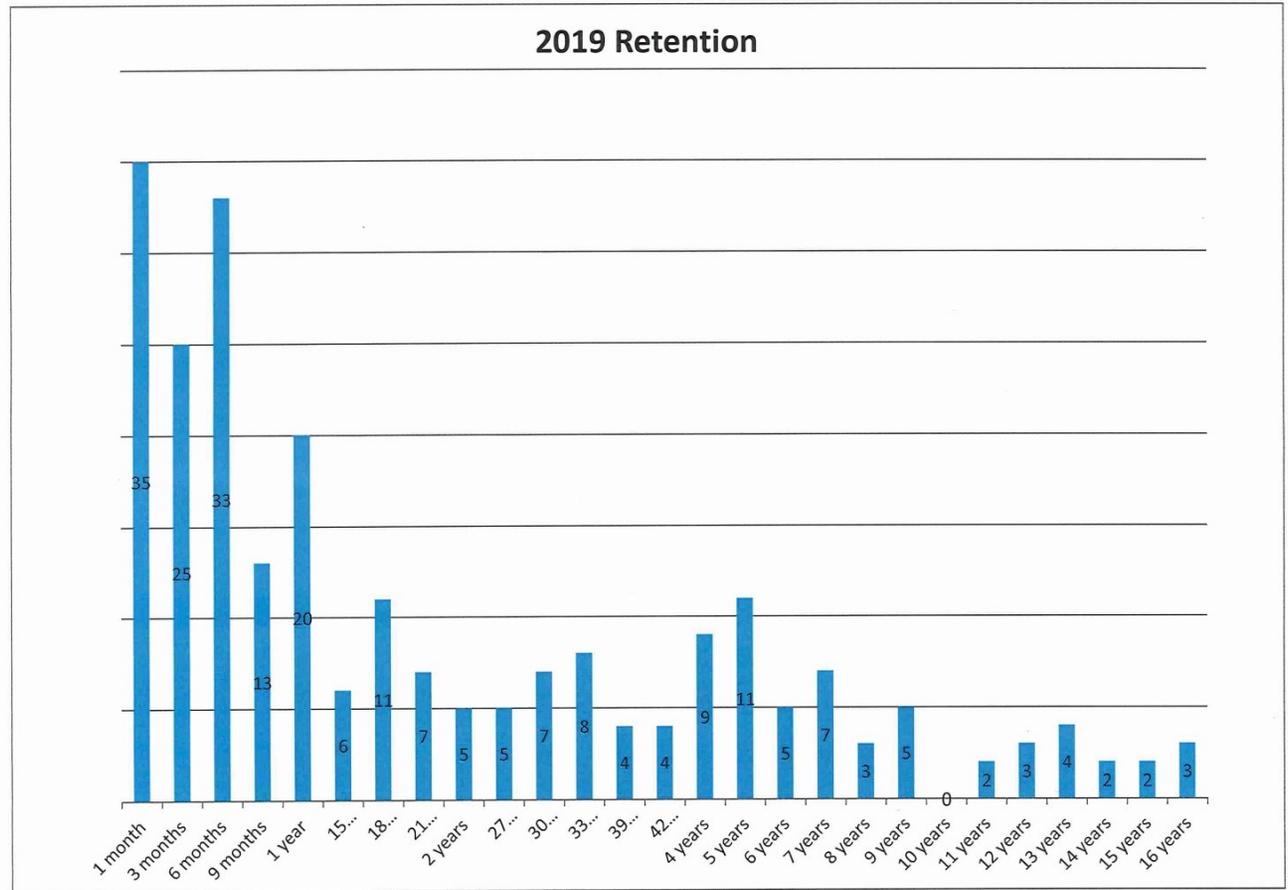
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Annual Incident Report Data 2018-2020

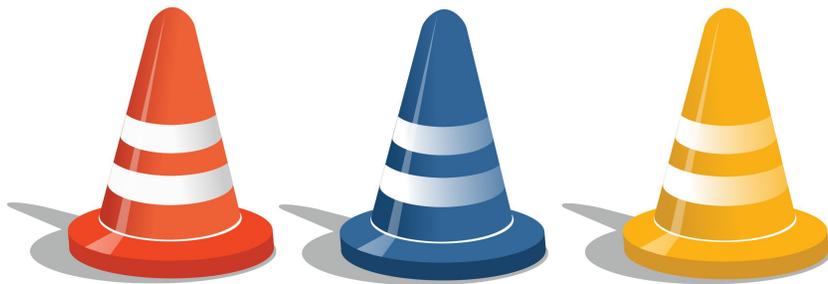


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Staff Retention Data for the Organization



TOET Updates and Improvements Summary



- Add Tiers 2 and 3
- Follow same validity path for expanding to tiers 2 & 3
- Creating new subscales for positive supports starting with Trauma-informed supports
- Work with the Arc to establish quality of life interviews as part of TOET

Adding Quality of Life Interviews to the TOET

Next Steps for Improving the TOET

Challenges with Direct Observation-works well for advanced organizations

If BCBA's are in management and leadership roles

Adding Feedback from People with Lived Experience

Work with regional team and organizations

Regional Council members will develop and assist in piloting quality of life assessment

2 provider organizations implementing over 3+ years will participate

Help to establish and finalize evaluation



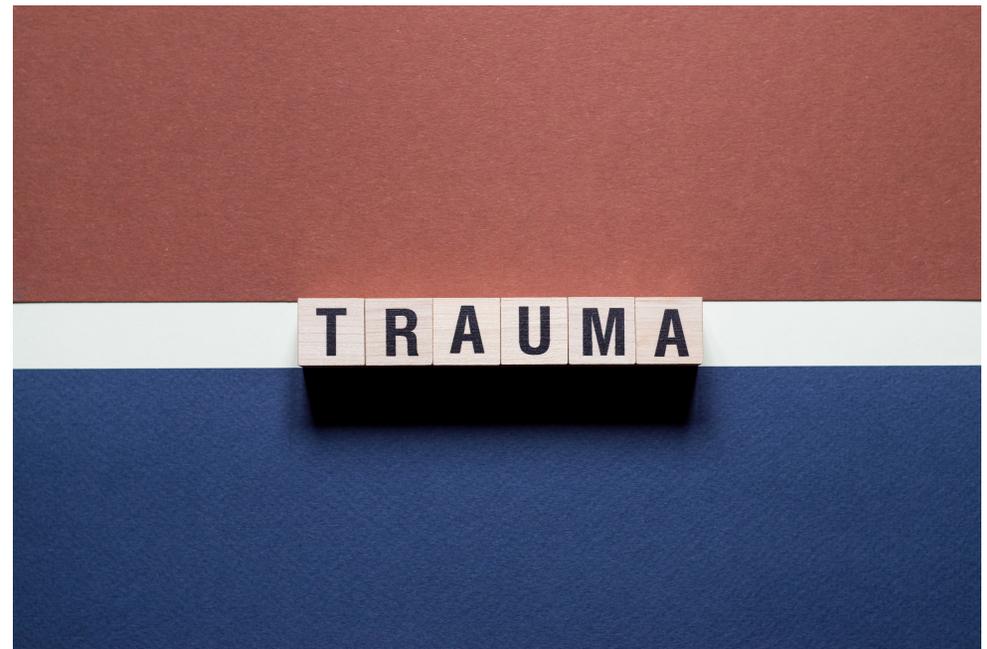
Adding Subscales to the TOET

Current Subscales

- Teams
- Person-Centered Practices
- Positive Behavior Support
- Cultural Responsiveness
- Supporting Staff
- Visibility

New Subscales (or Edits) Discussed

- Trauma-informed Supports
- Multiple PC Practices



Thank you for your time!

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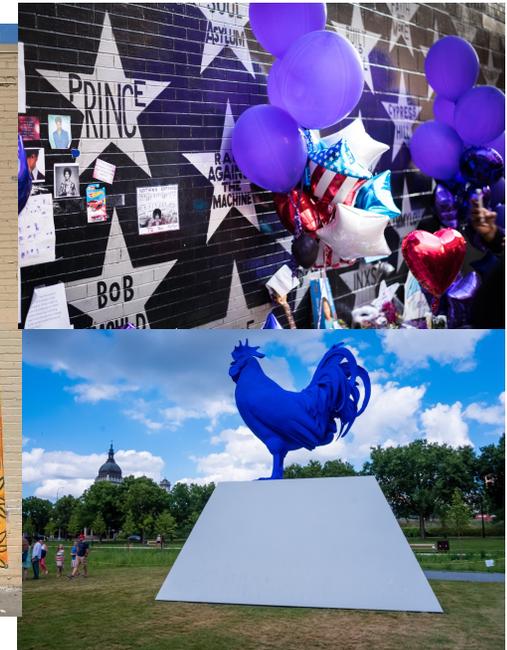
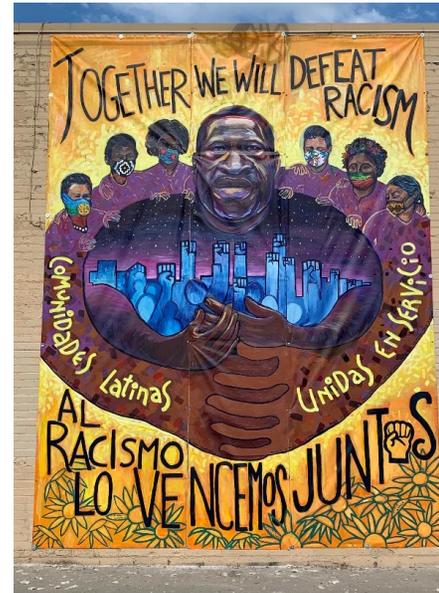
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