



# COMPASS-EZ™

A self-assessment tool for behavioral health programs

Creating welcoming, recovery-oriented,  
co-occurring-capable services for adults, children,  
youth and families with complex needs

A Two-part Training Series

# Part One: Getting Started with Program Co-occurring Capability Development

Understanding Your Organizational Baseline  
Using the COMPASS-EZ™

# Purpose and Content of Part One

- Teaches participants how to successfully use the COMPASS-EZ™ to self-assess program co-occurring capability.
- Topics include a description of the tool, its objectives, how to use it, and pitfalls to avoid, and advice on how to ready the organization for the process of using the COMPASS-EZ™.

# What is the COMPASS-EZ™?

- Co-occurring capability self-assessment
- Program-level tool
- Similar to an accreditation tool (asks for “evidence of”)
- Adapted versions available (Prevention, ID, PH/BH, etc.)
- Available from ZiaPartners, thru non-exclusive licensing agreement

# Domains of the COMPASS-EZ™

- Program philosophy
- Program policies
- Quality improvement and data
- Access
- Screening and identification
- Recovery-oriented integrated assessment
- Integrated person-centered planning
- Integrated treatment/recovery programming

# Domains of the COMPASS-EZ™

- Integrated treatment/recovery relationships
- Integrated treatment/recovery program policies
- Psychopharmacology
- Integrated discharge/transition planning
- Program collaboration and partnership
- General staff competencies and training
- Specific staff competencies

# Objectives of the COMPASS-EZ™

- Deep and rich conversation about the program
- Organized content regarding co-occurring or complexity capability,
- Consensus agreement by “the vertical core”
- Promote natural energy and ideas for improvement
- Track progress over time

# How to Use the COMPASS-EZ™

- Group conversation format, NOT individually scored
- About 2½-3 hours (continuous or interval)
- Consensus scoring using a 1-5 Likert scale
- Rarely needs facilitation



# Example COMPASS-EZ™ Questions

- Program Philosophy
  - Written program descriptions specifically say that individuals and families with co-occurring issues are welcomed for care.
- Integrated Person-centered Planning
  - For each of the co-occurring issues listed in the plan, there is an identified stage of change, stage-matched interventions, and achievable steps to help the person feel successful.

# Avoiding the Pitfalls

- Doing the COMPASS-EZ™ “out of the blue”
- Passing out the tool and scoring separately, then averaging the numbers
- Forgetting to document the conversation and potential action steps
- Focusing on getting a higher score
- Overusing “Not Applicable”

# Getting Ready to do the COMPASS-EZ™

- Build the organizational context for working on co-occurring capability.
- Set the organizational direction.
- Identify a helpful Change Agent.
- Create a “vertical quality improvement team.”
- Have one or two preliminary conversations.
- Carve in/set aside focused time for the team.
- Round of applause for the team!

# End of Part One

- Part Two: Program co-occurring capability development: Using your COMPASS-EZ™ organizational baseline self-assessment to create a relevant and manageable improvement process
- Topics include:
  - Organizational quality improvement partnerships
  - Action planning
  - Common starting places and steps toward program co-occurring capability



Thank You