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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 Two:
Program Co-occurring Capability Development

Using your COMPASS-EZ™ organizational baseline self-assessment to create a relevant and manageable improvement process

Purpose and Content of Part Two

- Teaches participants how to translate the COMPASS-EZ™ baseline self-assessment of co-occurring capability into an organizational improvement approach.
- Topics include:
  - Organizational quality improvement partnerships
  - Action planning
  - Common starting places and steps toward program co-occurring capability

12 Steps for Agencies and Programs Developing Co-occurring Capability

The following slides are for general guidance. The steps are a compilation of approaches that programs across the country have employed to successfully move toward co-occurring capability.

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1. Formal Announcement and Commitment

Program/agency leadership:

- Makes a formal commitment to achieve co-occurring capability for all programs.

- Announces it officially to all staff.

- Communicates to all staff about the CCISC implementation process.

2. Continuous Quality Improvement (CQI) Team

Leadership organizes and supports a continuous quality improvement team that:

- Represents all the different levels of the agency or program in a partnership.

- Engages in regular meetings to own and oversee the change process.

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3. Change Agent Team

The organization identifies a team of change agents that represents the front-line voice of clinicians, peers, support staff and others in *each* program.

- Change agents:
  - Become represented on the CQI team
  - Help other program staff achieve co-occurring competency in their procedures and practices.

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3. Change Agent Team

- The Change Agent Team becomes an empowered group:

  - To support the development of co-occurring capability in the organization/system

  - In partnership with executive leadership and management

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4. Goal: Co-occurring Competency for all Staff

- The agency or program includes in its formal commitment the goal that all service providers over time will develop co-occurring competency

  – Within the service they provide
  – Commensurate with their level of professional/clinical training and licensure (if any).

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5. Program Self-assessment

Each program uses a structured tool such as the COMPASS-EZ™ to conduct a program baseline conversation and self-assessment of co-occurring capability involving as many representative staff as possible. (See Part One of the COMPASS-EZ™ training for more detail on using the tool.)

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6. Program Action Plan

- Based on results of the COMPASS-EZ™ survey, each program creates an <u>achievable</u> 3-6 month action plan to make progress toward co-occurring capability, with prioritized starting places, incremental steps with measurable objectives, reasonable timeframes, and responsible people.

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6. Program Action Plan

- This action plan should be:

    - Simple and doable.

    - Derived from the program's own COMPASS-EZ™ conversation.

- Action plans are:

    - Dynamic.

    - Frequently updated by program CQI team.

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6. Program Action Plan

- Six C's of Action Planning:
  - Co-occurring capability focused
  - Committed
  - Comprehensive
  - Concrete
  - Connected
  - CQI-based
- The following slides are common action plan starting places.

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Sample Action Plan Template

AGENCY/PROGRAM			Date: 2023
Strength Based Discussion: Describe progress that the agency or program has made in the 12 steps of the CCISC process in inspiring services for customers: e.g., person/family centered, recovery- or resiliency-oriented, trauma-informed, complexity/co-occurring capability.			CQI Team Members and other Change Partners Agency/Program's Inspired Vision:
List 3-4 issues that were identified through COMPASS self-assessment(step 5) and other processes. Usual starting places for change (steps 6-12): WELCOMING, ACCESS, HOPE, SCREENING & DATA, ALL STAFF COMPETENCY	WHAT DO WE DO? (Small step measurable interventions for each objective)	RESPONSI BLE PERSONS (Who does what for each interventi on?)	Timeframes, Milestones of Progress and Opportunities for Rounds of Applause (for each objective)
1. Issue: e.g., Welcoming Agency/Program's Goal for the issue/ List objectives e.g., improve welcoming policies/practice for COD Objectives	a. b.	a. b.	a. b.

7. Welcoming and Access

The program action plan:

- Addresses welcoming individuals and families with complex needs in program spaces, policies, procedures, clinical and support practice and staff competencies.

- Emphasize welcoming those who may be challenging (e.g., active substance use)

- Identifies access barriers that need to be removed.

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8. Screening, Identification and Counting

The program action plan:

- Improves consistency of screening for and documentation of co-occurring issues

- Improves measurement of baseline data on how many co-occurring clients and families are served.

- Develops a CQI (plan-do-check-act) cycle to improve recognition of the population.

9. Empathic, Hopeful, Integrated Strength-based Engagement and Assessment

The program action plan focuses on development of integrated engagement and assessment protocols and skills:

- Communication of empathy and hope
- Documentation of hopeful goals
- Identification of periods of success, and strengths used to address each issue
- Strength-based case presentations
- And more….

10. Integrated Stage-matched Recovery Planning & Programming

- The program works on policies, procedures and processes for improving:

  – Integration and stage-matching in recovery plans

  – Documentation of integrated stage-matched interventions for each issue

  – The use of co-occurring skills training, stage-matched groups, and positive rewards as part of routine service planning.

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11. Co-occurring Competency for all Staff

- Initial assessment of current workforce competency: CODECAT-EZ

- Use 12 Steps of Competency for staff to identify specific objectives for each staff to practice

- Provide small steps of training with follow-up practice opportunities.

- Implement supervision and coaching to support learning: ILSA Supervision Workbook

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12. Interprogram Partnership and Collaboration

- Identify a partner program in the "other" domain.

- Set up times to meet and get to know one another.

- Find small steps for mutual education, cross-consultation and in-reach

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End of Part Two

Thank you very much for completing
this COMPASS-EZ™ training.