

Toolkit for Evaluation, Assessment, and Monitoring (TEAM)

Andrew Sarkin, Ph.D.
Frances Reyes, M.A.



Agenda Overview

- ▶ Introduction
- ▶ Update on earlier MHSOAC project
- ▶ Background for this toolkit
- ▶ Current toolkit project overview
- ▶ Collaboration needs and ideas

Project Staff

HSRC

- ▶ **Andrew Sarkin, PhD**
Project Director
- ▶ **Frances Reyes, MA**
Project Manager
- ▶ **Kyle Choi, MPH**
Informatics Project Manager
- ▶ **Jessica Rampton, MPH**
Research Evaluation Specialist
- ▶ **Edith Wilson, PhD**
Research Associate
- ▶ **Gina Beal, MPA, MA**
Program Evaluation Associate
- ▶ **Justine Zimiles, BA**
Program Evaluation Specialist
- ▶ **Logan Johnson, BA**
Program Evaluation Specialist

FIRST MHSOAC
PROJECT AND
BACKGROUND

CSS Tracking,
Monitoring, and
Evaluation Project

Project Overview

Timeframe: May 2014 – June 2016 (completed successfully)

Goals: Development and pilot implementation of a standardized data collection system for adults receiving non-FSP MHSA CSS services that allows for evaluation of those clients and services, and can be integrated into other Electronic Health Records or Data Collection and Reporting Systems (such as eBHS and Avatar). Creation of policy and practice recommendations for how to improve upon current CSS services evaluation and quality improvement systems.

Primary Evaluation Questions Answered

- ▶ What statewide methods should be employed to ensure proper tracking, monitoring, and evaluation of adults receiving CSS services?
- ▶ What policies, practices, systems, and infrastructure should be created and/or modified to better track, monitor, and evaluate adults receiving CSS services?
- ▶ What policies, practices, systems, and infrastructure should be created and/or modified to better use information to serve adults within the CSS component?

Domains and Data Elements

- ▶ Review of relevant documents and guidelines
 - ▶ Mental Health Services Act requirements and goals
 - ▶ Bronzan-McCorquodale and other laws
 - ▶ MHSOAC and DHCS goals
 - ▶ National Behavioral Healthcare Quality Framework
 - ▶ Relevant published work on measuring outcomes
 - ▶ Results of other similar projects
 - ▶ MOQA, MHDATA DCR, County-level efforts, SAMHSA, etc.
- ▶ Input from stakeholders with surveys, focus groups, interviews, and Evaluation Advisory Group with workgroups
- ▶ Review of current systems such as CSI, DCR, and the Electronic Health Records and other Data Collection Systems being used
- ▶ Review and comparison of validated measures

Contributing Stakeholders

- ▶ MHSOAC
- ▶ DHCS
- ▶ REMHDCO
- ▶ California Mental Health Planning Council
- ▶ County Administrators and Contract Supervisors
- ▶ Clinicians and Staff
- ▶ Subject Matter Experts
- ▶ Policy Makers (Bruce Bronzan, Rusty Selix, more)
- ▶ People with lived experience who use services
- ▶ Family members of people with lived experience
- ▶ Local members of Evaluation Advisory Group

Products of the Previous Project

- ▶ Assembled information from stakeholders, current legislation, mental health agencies, existing data collection systems, outcome measures, and reviews of validated instruments
- ▶ Developed a system to include outcome measures, assessment completion protocols, and data collection and reporting, that can work across multiple systems
- ▶ Implemented a pilot system in fall 2015 to spring 2016
- ▶ Gathered feedback from end user surveys, focus groups, and the Mental Health Services Evaluation Advisory Group (MHSEAG)
- ▶ Developed or adapted measures to fill gaps expressed by stakeholders, such as a measure for family/friends and a strength-based self-report

Measures Developed

- ▶ Illness Management and Recovery (IMR) – Family/Friend Version
 - ▶ Allows key people in the client's life to assess recovery progress using some of the same dimensions as the clinician assessment
 - ▶ Scales combine items to measure: Symptom Management, Participation in Wellness Activities, and Substance Abuse
- ▶ Combined Health Assessment: Mental, Physical, Social, Substance, Suicide (CHAMPSSS)
 - ▶ Measures recovery from the client's perspective and encourages clients to take an active role in treatment planning
 - ▶ Data is comparable to a wide variety of state and national data being collected using NIH PROMIS
 - ▶ Allows for cost effectiveness analysis using Quality Adjusted Life Years

Sample of Select Recommendations

- ▶ Specific measures and assessment methods were recommended
- ▶ Use of validated, recovery-oriented outcome measures
- ▶ Measures to capture program and service characteristics
- ▶ Optional data elements that programs may choose to complete
- ▶ Client-completed measures for use with various populations
- ▶ A measure completed by family member or other close supporter
- ▶ Customizable reporting formats designed to ensure the usability of data collected for various audiences
- ▶ Data collection software that is integrated with other electronic health record systems
- ▶ Training for clinicians in using the data to provide better services

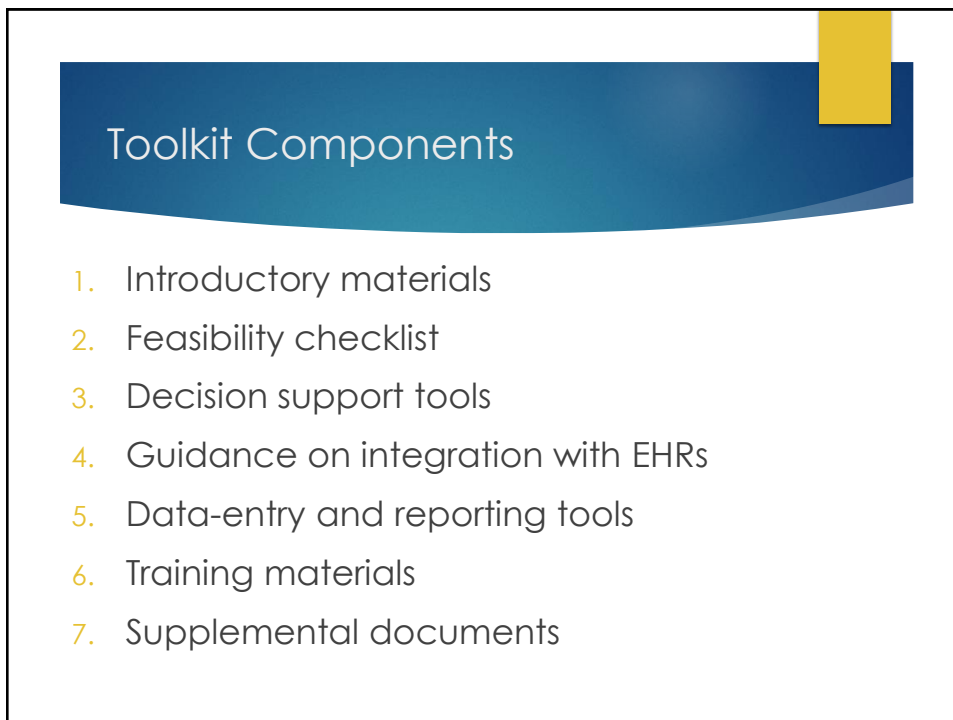
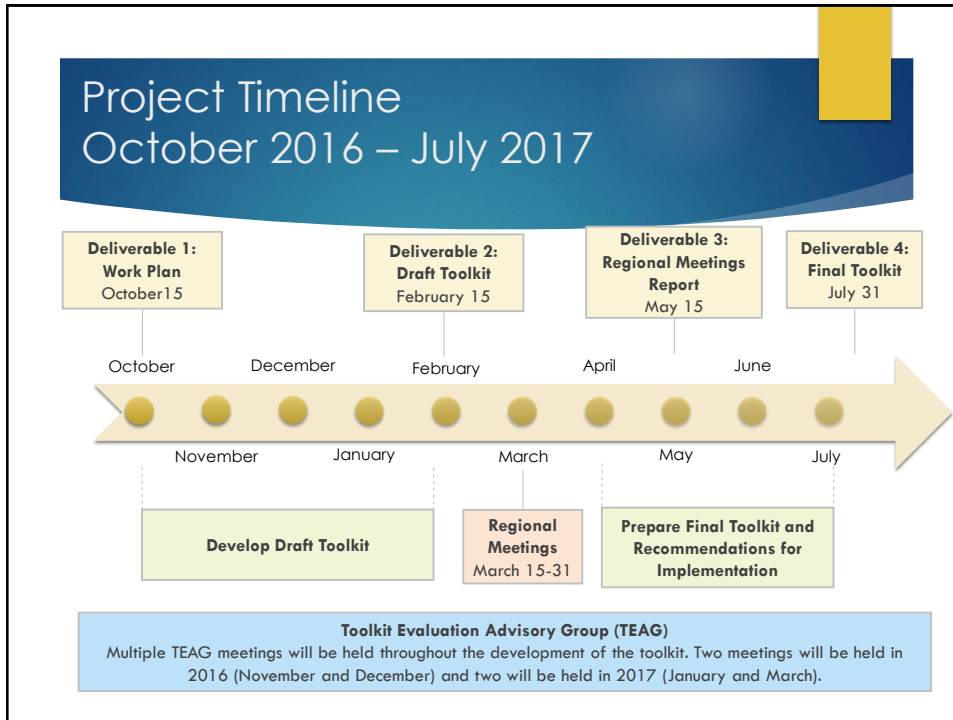
OVERVIEW OF CURRENT PROJECT

Toolkit for Evaluation,
Assessment, and
Monitoring (TEAM)

Purpose of the Project

Development of a toolkit that will:

- ▶ Assist counties with assessing the feasibility of adopting a tracking, monitoring, and evaluation system
- ▶ Provide decision support on what measures to implement, and how to implement them using available systems such as eBHS
- ▶ Aid MHSOAC in providing technical assistance to counties wishing to adopt a tracking, monitoring, and evaluation system
- ▶ Improve mechanisms for the negotiation and sharing of standardized tracking, monitoring, and evaluation data
- ▶ Enhance the clinical usefulness of new or current tracking, monitoring, and evaluation systems, and improve reporting



Toolkit Evaluation Advisory Group (TEAG)

- ▶ Review toolkit materials
- ▶ Ensure needs of staff and clients are addressed to increase clinical utility
- ▶ Discuss strategies to maximize the utility of the toolkit for all stakeholders
- ▶ Help to plan dissemination of the toolkit

TEAG Members

- ▶ Dave Pilon
- ▶ Dawn Kaiser
- ▶ Joshua Morgan
- ▶ Lezlie Murch
- ▶ Liz Miles
- ▶ Marshall Lewis
- ▶ Patricia Wentzel
- ▶ Rebecca Ballinger
- ▶ Rick Heller
- ▶ Saumitra SenGupta
- ▶ Sunjung Cho
- ▶ Tony Hobson



Feasibility Checklist

Purpose

- ▶ Designed to encourage counties and programs to consider organizational characteristics and implementation resources
- ▶ May be used to help organizations determine if there are obstacles that may prevent the success of implementing a data collection and reporting system for evaluation

Design

- ▶ 42 items and 5 domains
- ▶ Counties/programs consider Current and likely Future situations
- ▶ Scores range from 1 to 5; higher scores indicate greater feasibility of implementing a data collection and reporting system
- ▶ Can be completed in an Excel spreadsheet or entered from paper forms

Regional Meetings

- ▶ **Purpose:** Present TEAM and gather feedback to counties
- ▶ **Dates:** March 15-30, 2017
- ▶ **Locations:** Sacramento and San Diego

Opportunities for Collaboration

- ▶ Participation in the Toolkit Evaluation Advisory Group
- ▶ Attendance at the regional meetings
- ▶ Participation in interviews or meetings
- ▶ Presentations to this group
- ▶ Other ideas?

Thank you!

Andrew Sarkin, Ph.D.

Director of Evaluation Research
UCSD Health Services Research Center
asarkin@ucsd.edu