

# How to Conduct an Evidenced-Based Fidelity Site Visit So Everybody Wins

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While you are waiting for the webinar to begin please type your answer to the following question in the chat box:

What do you hope to learn more about by attending this webinar?



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# EBP Fidelity On-Site Visits

- Twenty Florida providers agencies were randomly selected to participate.
- You were selected based on experience and knowledge of process improvement and specific selected evidence-based practices.



# EBP Fidelity On-Site Visits

Prior to the site visit, providers:

- Conduct a self-review of a specific EBP
- Use the fidelity monitoring tool protocol
- Conduct client record reviews (12 files)
- Identify areas in the agency that need improvement
- Identify areas that could benefit from technical assistance (TA)



# Peer Mentors

- Conducts the on-site visit
- Completes the EBP fidelity tool review reports
  - Client records review (6 of the 12 files)
  - Program review
- Conducts the site visit exit interview and provides positive feedback
- Offers technical assistance as needed

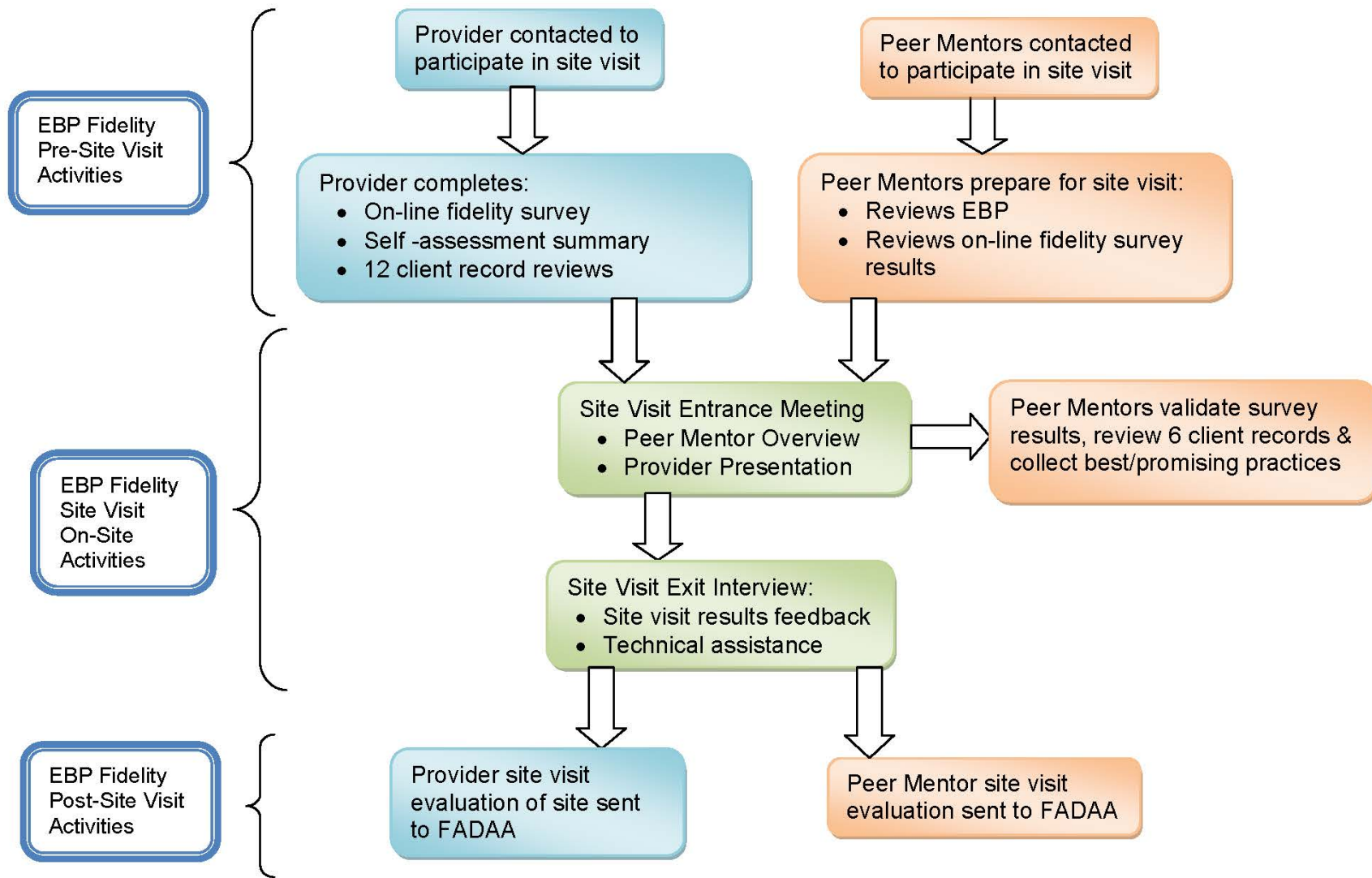
# Site Visit Process

To ensure a successful site visit, provider agencies are asked to:

- Have materials and source documents accessible for the peer mentor team.
- Designate a contact person.
- Have staff team available to work with peer mentors.
- Provide a place for the peer mentor team to work.
- Invite local SAMH supervisor, managing entity or community coalition representative to entrance and/or exit interview only.



# Evidence-Based Practice Fidelity Site Visit Process



# How Is This Webinar Structured?

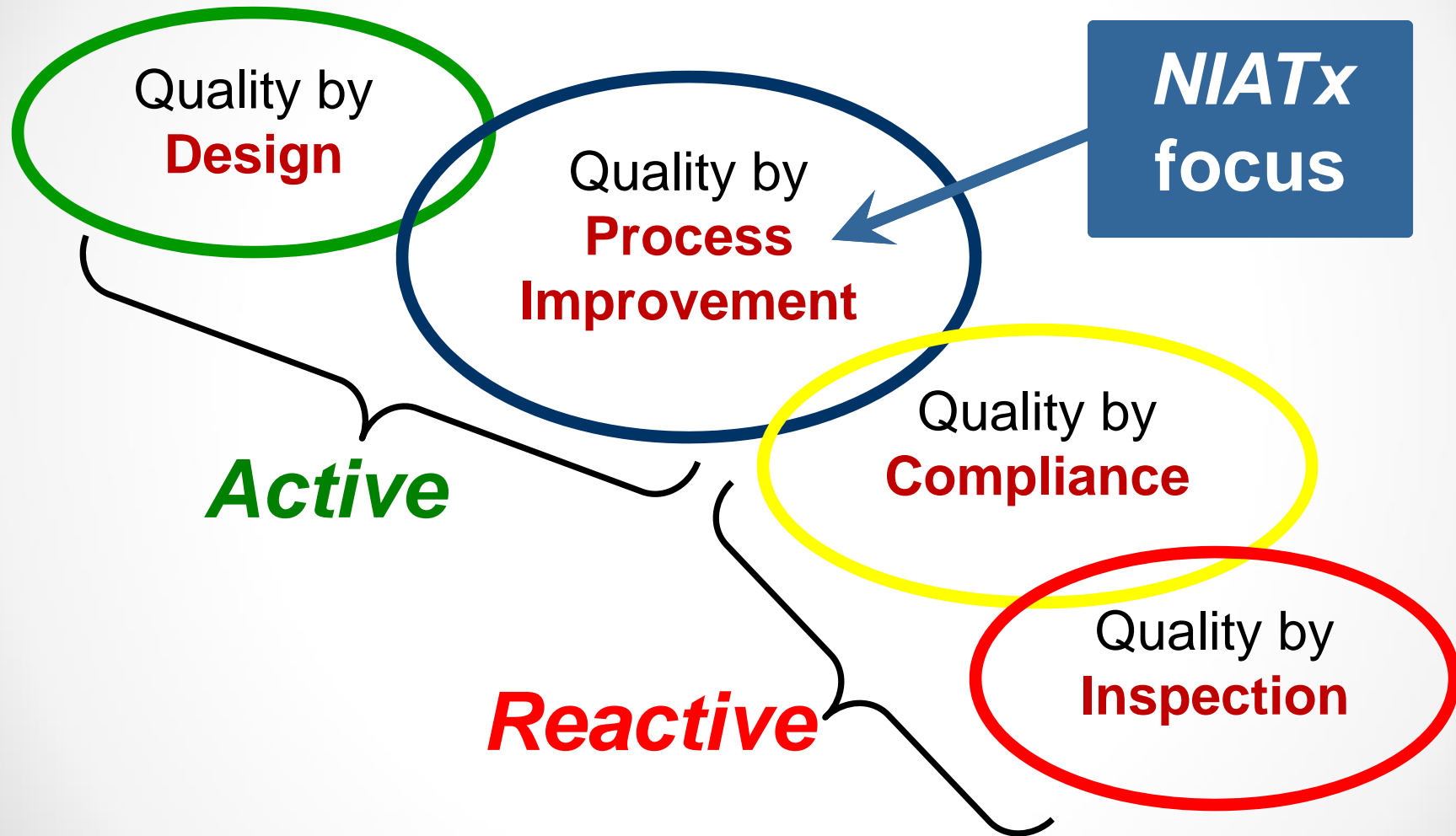
**LEARN** - something new

**DO** – we are going to practice using the new tools on this webinar

**SHARE** - your ideas and expertise to help round out everyone's expertise



# The **4** Methods of Quality





## Slide 8

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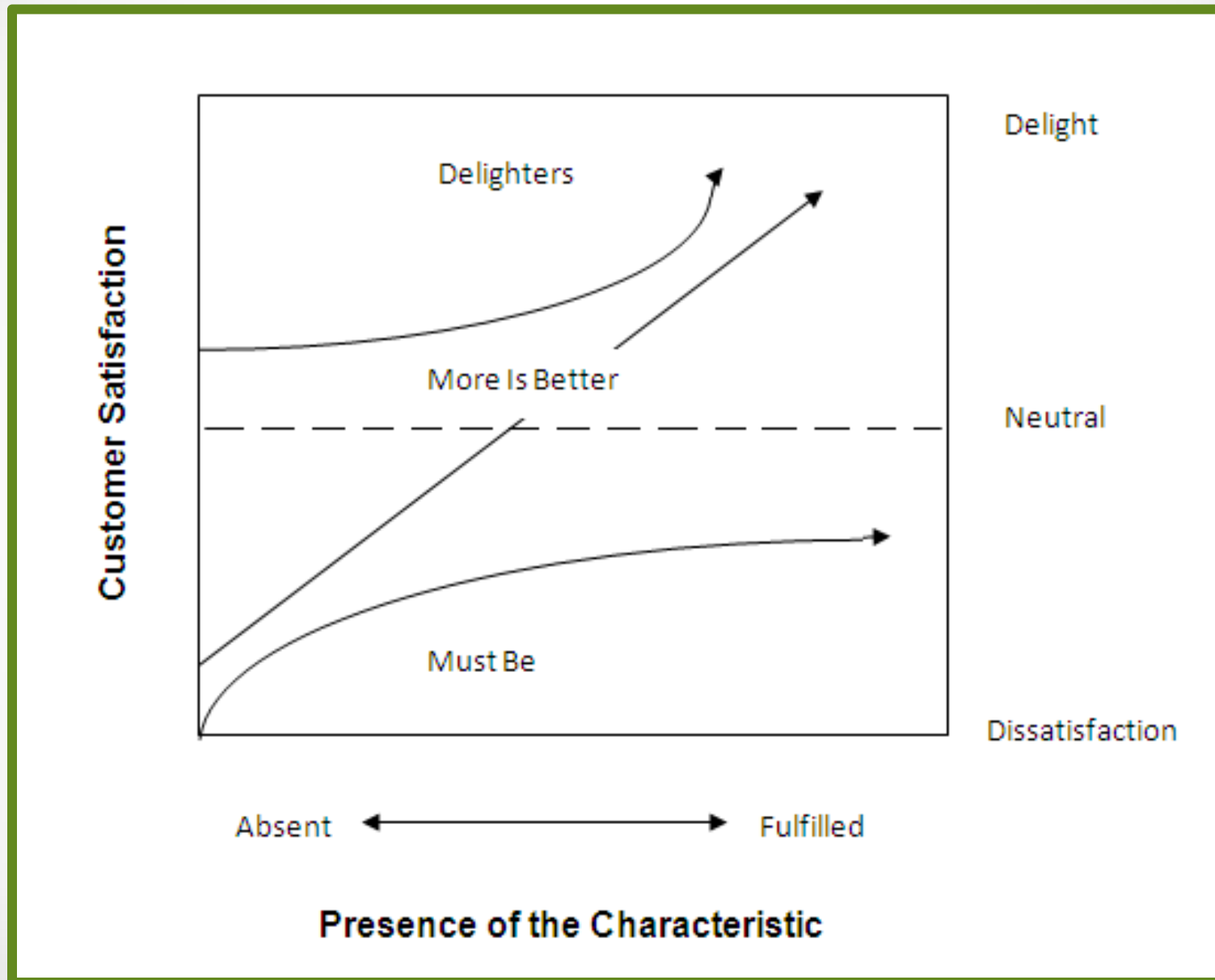
- EP1** Remove the word "to" from the information box below. The word repeats twice  
Peterson-Erik, 8/29/2014
- EP2** Change the word "let's" to lets  
Peterson-Erik, 8/29/2014
- EP3** Rephrase the sentence structure of the first sentence. "Anyone who has ever hear a spokesperson form NIATx speak....."  
Peterson-Erik, 8/29/2014
- EP4** Give the web address for NIATx. You may have participants who wish to learn more about there approach to the topic you are speaking on.  
Peterson-Erik, 8/29/2014

- Would you attend a training course run by someone with no experience?
- Would you buy from a sales professional who previously let you down?
- Would you go above and beyond for a leader who never kept their word?

# The Importance of Introductions

- How do you “bond” with someone in 10 minutes or less?
  - Building Trust
  - Establishing credibility
- Introduction Activity

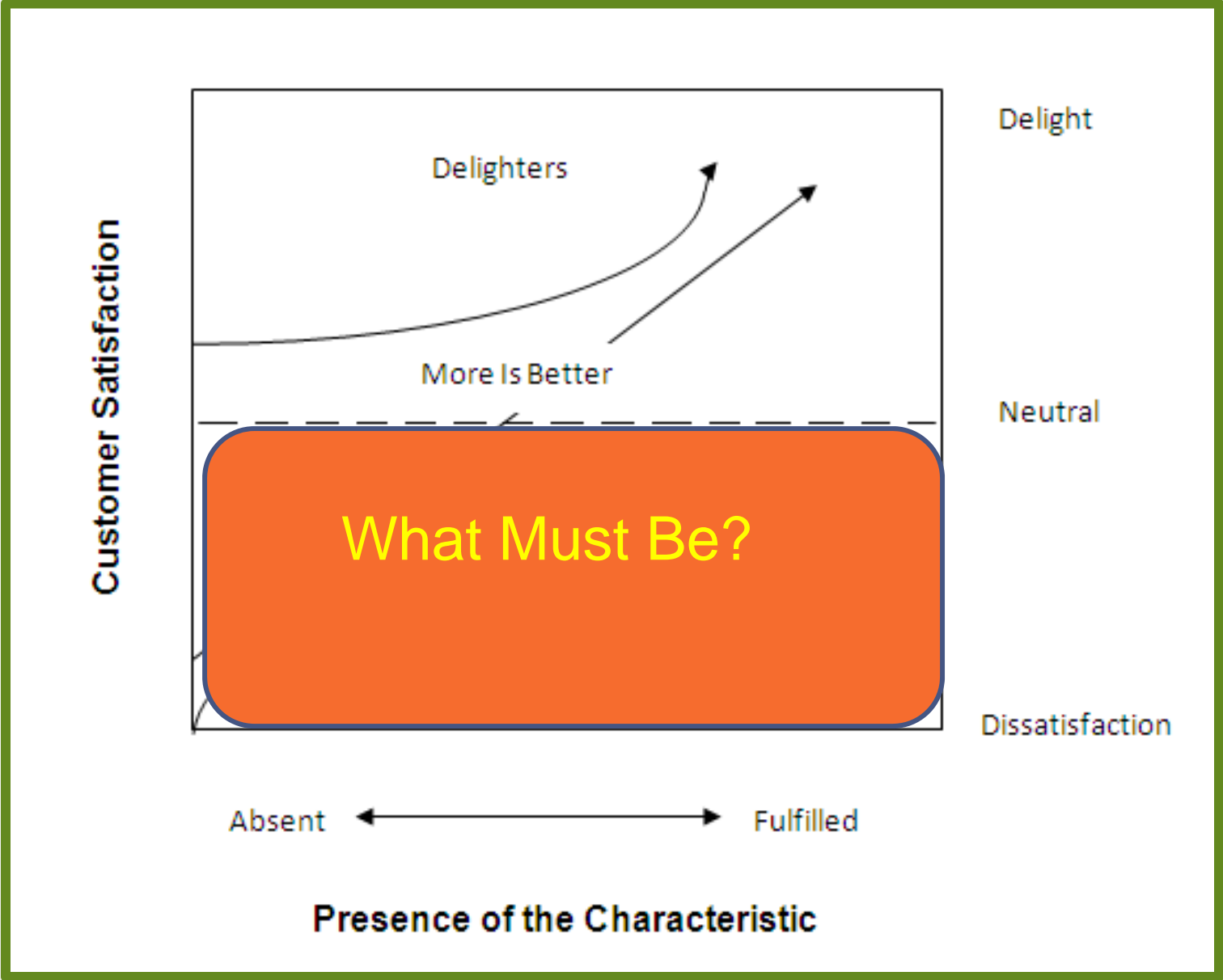
# Kano's Model of Customer Perceptions



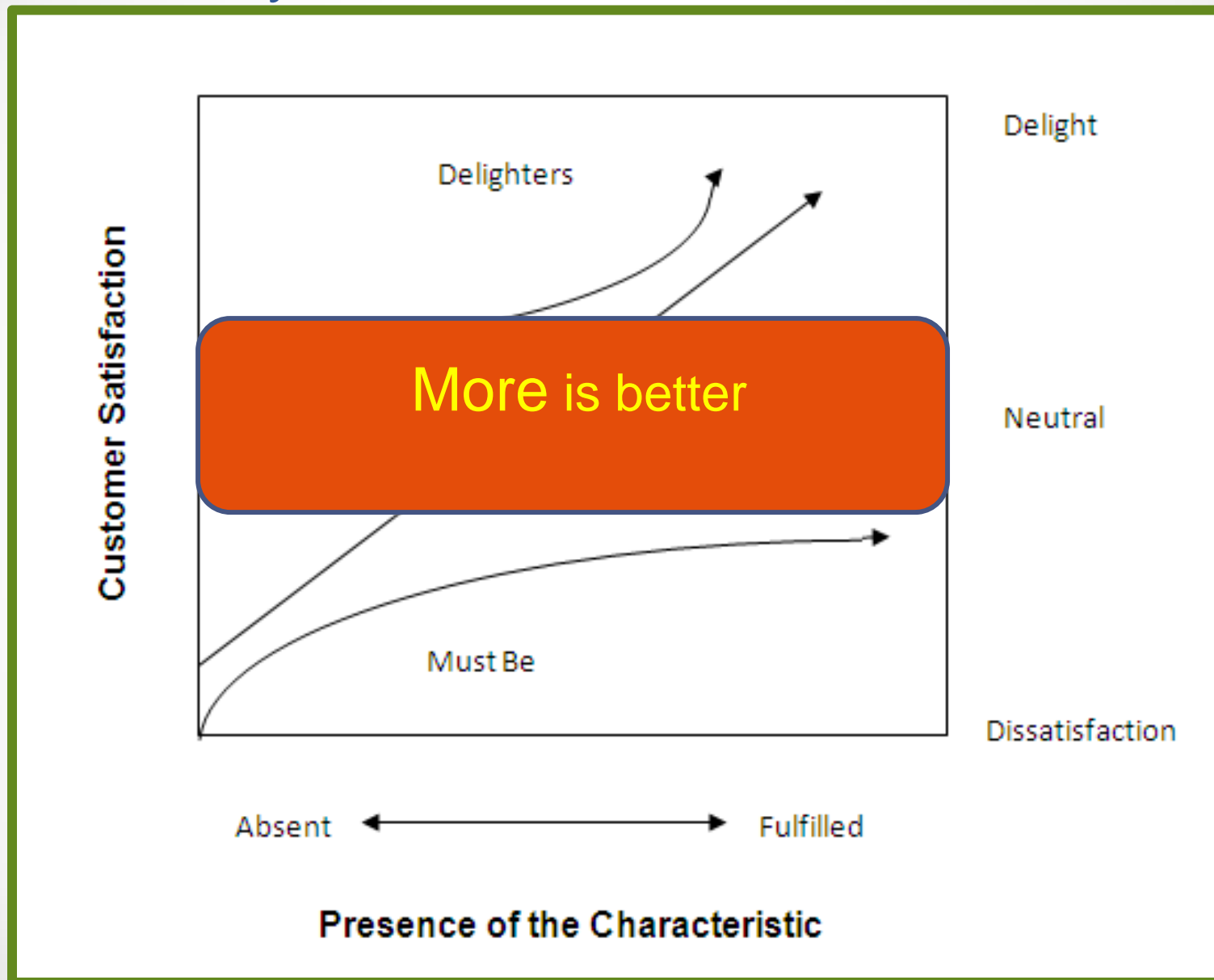
Let's Determine What You  
Already Know



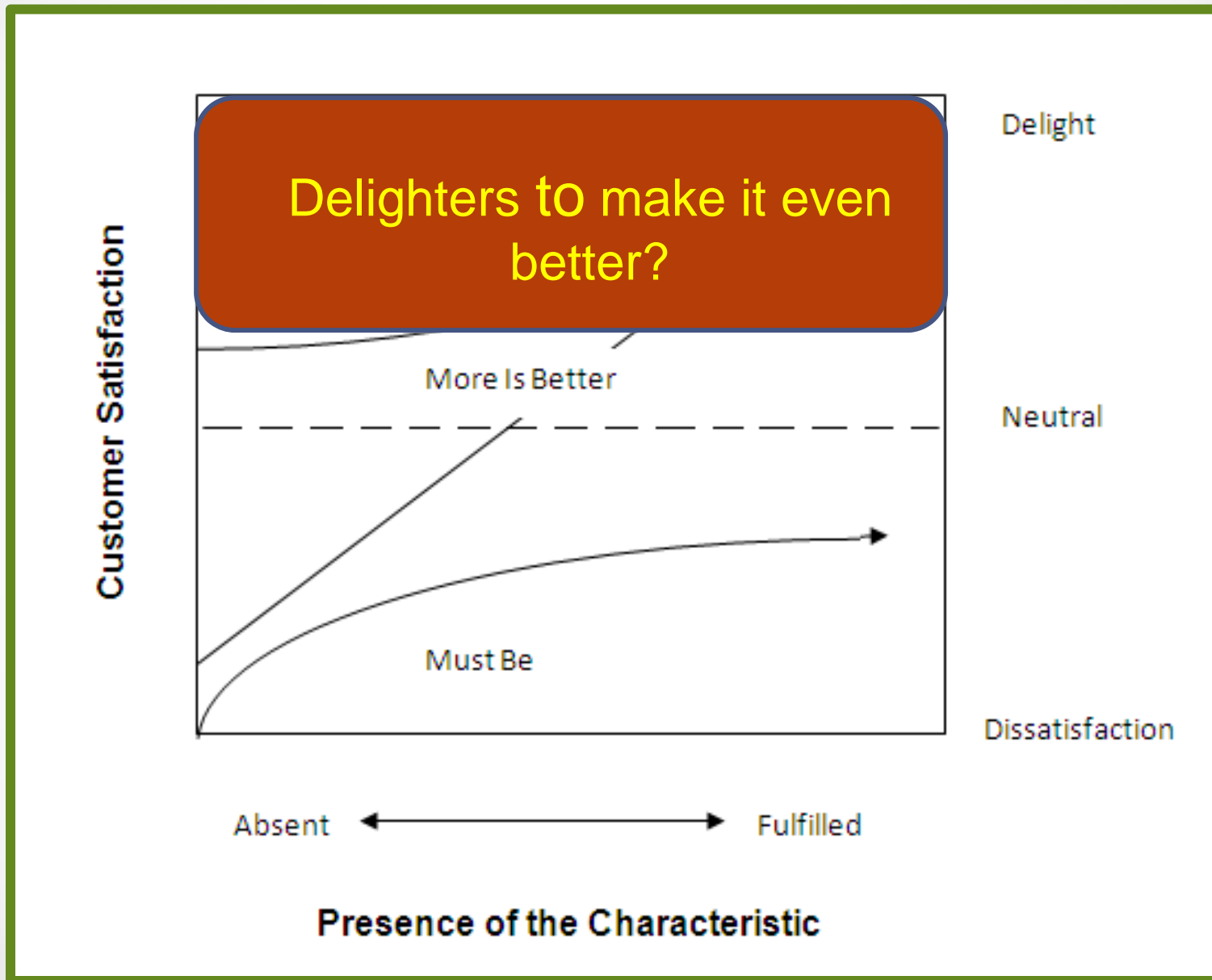
# When you engage in the peer visit, what must be?



# What can you do to make the visit even better?



# What can you do to delight the people you are visiting?





# People Are Busy

Help people determine how this priority fits into other competing priorities.

Sort out and align what changes are taking place in the market place.

Identify what priorities they are working on.

Decide where this project fits in and how to work it into the schedule.





A barber does a good lather before he begins a shave



- Build Your Character
  - Identify core values
  - Do the right things for the right reasons
  - Own it and correct mistakes
  - Deliver on promises
- Develop Expertise
  - Build expertise
  - Stay up to date with the industry
  - Establish and protect your reputation
  - Be transparent



# How Do You Do This?

- Come with your own story
- Ask people what they want to get out of the visit
- Evaluate the assessment and find a common ground
- Let them know you are here to assist, can and will follow up



# Take a Tour

- Ask lots of ?????? and listen
- NIATx Walkthrough Template  
<http://www.niatx.net/Content/ContentPage.aspx?NID=146>
- This is another opportunity to build connections with someone.
  - Identify what you have you in common.
  - Take note of where there is opportunity to implement a best practice.

# More Tools for the Tool Box

- Walkthrough
- Stop, Start, Continue
- Flowcharting
- Focus Arrow
- Putting It Into Action

# Coollest Tool in the World

Stop

Start

Continue



# Great Icebreaker

- To align staff and erase negativity.
- Identify common ground, similarities between leadership and hourly staff.
- A simple non-confrontational way to identify what is good, bad and what is important to the team.





Questions?

Feedback?



**BREAK**



# Reviewing the Assessment

Identify:

- the problem
- the best practice
- the first action step
- the due date

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# Flowcharting

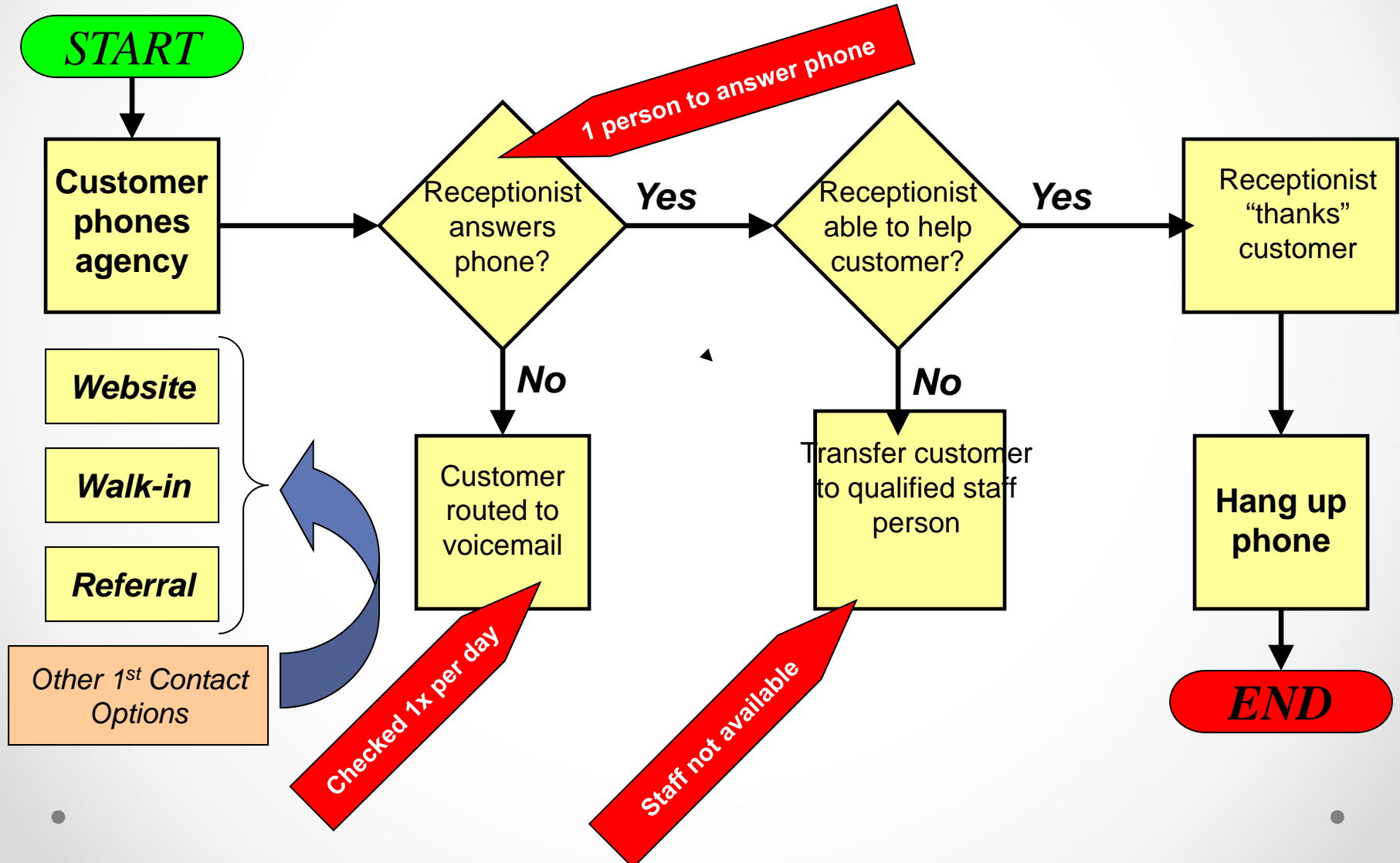
Forces an organization to  
look at processes

WHY?



# Sample Flowchart

Process name: *Customer 1<sup>st</sup> Contact (phone call) to Agency Response*



# For More Ideas Visit the NIATx Website

- Flow chart - documents the process as it really is
- Is a great way to engage an entire team
- Is a great way to identify bottlenecks and barriers
- To fit flowcharting into an already hectic workload – break it down into small pieces
- Can be messy and really big
- **Pretty is not the point**

# Focus Arrow

- What does done look like?
- What is included and what is not?

# Focus Arrow

"Done" Looks Like this

Example:

Beginning Point	Needs	Wants	Project Mission
Need to buy a house in the \$250,000 price range 2 parents, 3 children ( 2 boys 12 – 16yrs old and one girl, 8yrs).	3 bedrooms, 2 bath, 2 car garage, eat in kitchen, dry storage area, storm shutters	Screen Porch, at least 2 shade trees, workshop space to do wood working, dining room, within 2 miles of elementary school and close to park	Find a house for \$250,000 or less close to an elementary school, with a yard with trees or park close by. 3 bedrooms. 2 car garage, eating area that seats at least 8 people, fourth bedroom or storage area necessary. One full bath plus minimum of one half bath.

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**We can also provide an example for the purpose of Fidelity to Best Practices and how to clearly articulate what "done looks like" to determine scope of work project aim , data collection and best practices.**

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# Example: Site Visit

What am I doing here?

"Done" looks like this

Beginning Point	Needs	Wants	Project Mission
<ul style="list-style-type: none"> <li>Peer Mentor Site Visit is scheduled</li> <li>Agency Leadership complete Fidelity Self-Assessment Survey</li> <li>Follow the procedure in packet "Evidence-Based Practice Fidelity Site Visit Tools"</li> </ul>	Provide services and/or referrals to Block Grant priority populations using evidence-based practices and/or best practices <ul style="list-style-type: none"> <li>Pregnant &amp; parenting women</li> <li>Intravenous drug users</li> <li>Services related to TB and HIV</li> </ul>	Providers and peer mentors sharing knowledge & experience to improve services  Ongoing communication among providers & peer mentors regarding best practices until 2016	<ul style="list-style-type: none"> <li>Work together to assess fidelity in implementing EBPs</li> <li>Improve fidelity <u>and</u> improve targeted outcomes</li> <li>Provide mutual TA</li> <li>Meet block grant requirements, to service and or make appropriate referrals for priority pop. &amp; sustain funding</li> </ul>
1. Intent is to review 6 client files and check for fidelity to EBP	<ul style="list-style-type: none"> <li>Prevention services</li> </ul>		

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- "Secret shopper" calls to FL providers from federal agency, referrals or services not being provided as stipulated for block grant funding.
- Initiate a Process Improvement: Switch peer mentor site visit from voluntary to mandatory to improve the use of EBP's and fidelity
- 20 agencies chosen randomly for the mandatory peer mentor site visits
- Peer Mentors conduct a site visit to improve fidelity of EBP's for priority populations

# Putting It Into Action

- Committing to next steps
- Follow along while we review the worksheet
- Fill this out for your next steps for putting your peer review into action

**Was This Helpful?**

