



# EXPLORING POTENTIAL SDM<sup>®</sup> ASSESSMENT FOR FAMILIES INTERESTED IN COMMUNITY-BASED PREVENTION SERVICES

*Scope of work updated November 2022 for Child and Family Policy Institute of California*

## BACKGROUND

Evident Change has worked with public social service agencies for the past 40 years in developing and implementing Structured Decision Making<sup>®</sup> (SDM) assessments, which are research- and evidence-based tools that support decision making at critical junctures throughout the life of a case. As jurisdictions establish more robust child abuse and neglect prevention services, it is equally important to identify critical case decisions in this service stream and employ decision tools to support consistent, accurate, and equitable assessments of families engaged in these services.

Evident Change sees an opportunity to partner with community members, impacted families, community service providers, and public agencies to develop a community- and evidence-informed assessment that will support families in knowing what services and public benefits are available for their identified needs. The assessment also would strengthen the engagement of case managers in making cross-system referrals.

When developing new assessments, Evident Change establishes a multidisciplinary team that includes practice, research, and subject matter experts. This team conducts a comprehensive review of best practices and a literature review of peer-reviewed publications and white papers, and it gathers input from local community and system leadership. Stages of planning, discovery analysis, provisional assessment and policy development, and piloting are necessary to develop an assessment for use in community-based organizations.

This proposal outlines the initial discovery phase.

## **DELIVERABLES**

### **DISCOVERY AND PRE-IMPLEMENTATION PLANNING AND ANALYSIS**

This phase will take six to 12 months to complete, depending largely on the ability to schedule meetings with project leadership and stakeholder groups and timeliness in securing a data sharing agreement and granting Evident Change access to the data.

#### **Project Plan Development, Document Review, and Project Kickoff**

Evident Change will meet with the project leadership team to establish a six-to 12-month work plan; identify steering committee role and members; and establish stakeholder workgroup role, members, and meeting cadence.

Data sharing, access, and analysis planning will be specifically discussed, and leads will be identified. Evident Change project staff will conduct an offsite review of statutes, local policies, planning, and operational documents to understand service delivery and goals of engaged public agencies and prevention services providers. The team also will complete a scan of academic literature and white papers to understand what is known about prevention goods and services impact and outcomes.

In partnership with the steering committee, Evident Change will facilitate an in-person meeting with the stakeholder workgroup to launch the community-based discovery activities. These will include a presentation of the project plan, discussion of project goals, and what success will look like. Other activities will likely include a review of current practices, identification of prevention and family support resources, and discussion of resource availability and access.

#### **Process Mapping for Prevention Services**

In coordination with the travel for the kickoff meeting, Evident Change will facilitate a one-day onsite meeting with the stakeholder group to review or create a process map for prevention services. Process mapping documents how families engage with and receive services, and it highlights the critical decision points within the process. Referencing the academic literature review and other background documents, Evident Change staff will facilitate a discussion with the workgroup to identify possible assessment models. The selected model will document the shared vision of success for the assessment and will be used throughout the development, training, and implementation of the assessment to evaluate implementation, assessment fidelity, and impact.

## **Data Acquisition or Access and Discovery Analysis**

The data acquisition and discovery analysis will be guided by a work plan co-created by Evident Change and the steering committee. This analysis will seek to quantify key decisions and clients with as much specificity as possible. Wherever possible, profiles will be disaggregated to examine them by race/ethnicity, gender, location, time, and other equity interest groups. The analytics can become baseline metrics of current practice and may support formative development of a decision support. The following activities may be used to support work plan development.

- Conduct an inventory of existing data sources, data reports, and data sharing among project partners to understand what sources of data exist for the families who are being served by project partners and how the data is currently used.
- Facilitate a data focus group to review the data inventory, identify gaps, and offer input on if and how the data may be used to understand the families being served and the services being provided.
- Draft baseline metrics and facilitate consensus on them. Where possible, these metrics will be populated from systems data and/or existing reporting. The baseline metrics will also identify data gaps and contingencies where appropriate.
- Conduct an ad hoc data analysis to inform questions identified by the data focus group and/or steering committee. The analysis may be completed either by the Evident Change team or through coaching a local team of data analysts with access to the data.

Insights and themes derived from the discovery analysis will be shared with the steering committee and stakeholder workgroup. Findings will be shared in a web meeting and a brief written summary.

## **Observations and/or Interviews**

Evident Change will engage public agency and community-based staff in focus groups or interviews to gather their perspectives on how family assessments and referrals currently occur and opportunities for improvement. Concurrently, Evident Change will partner with stakeholder workgroup members to identify and engage families from the community in focus groups or interviews to get their perspectives on assessments, referral, and service delivery. Evident Change may also visit offices to observe practices.

## **Pre-Implementation Summary Report**

Evident Change will produce a report that summarizes lessons learned from the pre-implementation work - documentation and literature review, discovery analysis, process/client journey mapping, and observations and interviews. The report will include recommendations for assessment development, informed by the discovery activities. Evident Change will present the report findings to the steering committee during a half-day meeting and will facilitate a discussion to determine whether a provisional assessment would be suitable to use.