TIP Solutions Review (TSR) Process

TSR Monitoring & Mentoring Checklist

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September 10, 2019 Version

This *TSR Checklist* Can Be Use in Two Ways

1. **Self-Monitoring**: A Supervisor of a Transition Team can use this *TSR Checklist* as a "self-help" guide for conducting the *TSR* sessions.
2. **Mentoring**: A TIP Model® Consultant can use this *TSR Checklist* for monitoring and mentoring a Supervisor and Team as they conduct a *TSR* session with the Consultant observing in-person or by a teleconference or Skype call. The **Instructions for the Consultant for using this *TSR Checklist*** are in the **_TSR Protocol_** (See Appendix B in the *TSR Protocol*).
    - ❖ NOTE: There is an on-line *TSR SurveyMonkey* that Fidelity Assessors and Consultants can use as well. Access is arranged through Mr. Ricardo Rivera or Dr. Karyn Dresser at the SBHG Research & Program Practice Department (Ricardo Rivera jrivera@starsinc.com). The SurveyMonkey is used only after the *TSR Checklist* has been used initially.

NOTE 1: The Purpose of the TSR process is shown in **Appendix A** at the end of this Checklist. Also, some ways of **"Streamlining" the TSR Process** are outlined in **Appendix B**.

NOTE 2: Items in "Section A" of the *Checklist* cannot be Monitored Directly **

- ❖ Typically, a Consultant would need to discuss these Items** with a Supervisor. Items from Sections A & E cannot be directly observed with in-person monitoring, and certainly not when doing a teleconference.

NOTE 3: Monitoring the *TSR* Session This *Monitoring & Mentoring Checklist* is designed for use with one *YP Descriptive Outline* review at a time. If a *TSR* session involves 2 YP being reviewed, please use a separate *Checklist* for each.

NOTE 4: Key to Terms

- ❖ **Moderator** = The Supervisor or other Team Member who manages and facilitates the TSR planning, presentations, and/or discussions. For some Teams, the Supervisor does this consistently, for other Teams a different Team Member serves as the designated Moderator for a given TSR session. Of course, ultimately, the Team Supervisor is responsible for the overall functioning of the TSR sessions.
- ❖ **Primary TF (Transition Facilitator)** = The TF who is responsible for preparing and presenting on a particular young person using the *Young Person Descriptive Outline*.
- ❖ **YP** = Young Person (Youth or Young Adult)
- ❖ **TFs** (Transition Facilitators) = Refers to all Team Members who are working with the young people (e.g., TF, Peer Support Specialist, Emp/Edu Support Specialist, Therapist, etc.)
- ❖ **Team or Team Members** = Personnel working on the Transition Team at an agency who are regularly participating in the TSR sessions [e.g., TFs, Peer Support Specialists, Employment/Education Specialists, Team Supervisor[s]).

TIP Solutions Review (TSR)
TSR Monitoring & Mentoring Checklist

Supervisor or **Consultant**: Please indicate if you "agree" or "disagree" that the item has been met. Also make notes of questions, suggestions, or issues to clarify.

Features of the *TSR Process* that cannot be directly observed: **A. Supervisory Preparation & Support of TSR Session.**** Responsibility of the Supervisor.	Agree	Disagree	Please make notes to: a) provide positive or corrective feedback, & b) clarify any aspects of your response.
1. Selection of the YP was determined between the Supervisor & the primary TF to be relevant to the TF. A YP was selected because of her challenges or to celebrate the YP's progress & learn about how the TF facilitated the YPs progress – & to provide continuing competency enhancement of at least some of the Team Members.**	A	D	
2. Selection of the YP was determined at least 4 work days prior to the session so that primary TF could prepare a *YP Descriptive Outline*.**	A	D	
3. *YP Descriptive Outline* was completed prior to the TSR session & made available to all relevant parties. It is preferable that the completed *YP Descriptive Outline* was duplicated so that Team Members have copies for the session. Alternatively, the information from the Outline can be written as bullets on flip chart pads (or a white board.) If a Consultant or SBT is monitoring/mentoring the process for this session, she/he should have received a copy (hard or electronic) of it prior to the TSR session.	A	D	
4. All Team Members were present [e.g., Supervisor(s), TFs, & other relevant Peer Support Specialists, Job Developer, etc.; except for excused absents).**	A	D	
5. Supervisor/Moderator ensured that the Team Members have TIP Model® Guidelines, Core Practices, ENGAGERS, & the Transition Domains available visually for the session.**	A	D	
6. Supervisor/Moderator kept notes (or arranged for someone to keep notes) regarding the ideas & suggested strategies that are discussed so that the TF & the Supervisor can review these after the session to assist the TF in prioritizing which of the strategies or combinations of strategies might be best to advance her/his work with the YP.**	A	D	
7. There is a rotating schedule for TF presentations to allow all TFs equal opportunity to present in TSRs over time.**	A	D	
8. Over the past 3 months, at least 2 YP were reviewed by the entire Team each month.**	A	D	

Features of the *TSR Process* **Most of these Items can be <u>observed directly</u>.**	Agree	Disagree	Please make notes to: a) provide positive or corrective feedback, & b) clarify any aspects of your response.
B. Contribution & Responsiveness of the TF Presenter. (A TF or several TFs might be presenting the YP).	A	D	
1. The TF presenting the YP <u>provided adequate information across the categories of the *YP Descriptive Outline*</u> for the other Team Members to understand the YP's circumstance & what the TF has been doing to assist the YP. This initial presentation should be relatively brief, although questions from the group might extend it.	A	D	
2. <u>TF was responsive to questions, provided relevant information to questions, & was responsive to suggestions</u> regarding the YP, the YP's circumstances, & the TF's work with the YP.	A	D	
C. Contribution of the Team Members to the TSR Process.	A	D	
1. Most of the other Team Members <u>asked relevant questions or provided clarifications</u> regarding the: TF's work with the YP; this YP & her circumstances; &/or the role & circumstances of other key players in the life of this YP.	A	D	
2. Most of the <u>TFs contributed suggestions for possibly strengthening the work with the YP</u> (e.g., application of other TIP Model® Core Practices, operationalizing the use of TIP Guidelines, reframing issues to try to clarify an issue or provide a different perspective, providing information regarding other community resources, &/or suggesting other relevant strategies that might advance the work with this YP.).	A	D	
3. The Moderator or Team Members <u>occasionally linked the suggested strategies to the TIP Model®</u> Guidelines, Core Practices, ENGAGERS, Transition Domains, &/or Planning Partners/Necessary Connections, etc.	A	D	
D. Moderator facilitation of the TSR Discussion			
1. There is a <u>Team Member who is serving as the Moderator for this TSR session</u> (e.g., Supervisor, Team Lead, another TF).	A	D	
2. The <u>Moderator managed the presentation & discussion so that most of the time was spent on discussing ideas & suggestions for improving</u> the TF's work with the YP. • Typically about 30 mins. designated for brainstorming. • If after 30 mins., the discussion is still rich, the Moderator should ask for a vote if the Team wants to spend 5 or 10 more mins. on this discussion. • Moderator, remember to preserve 3-5 mins. at the end to summarize the suggestions.	A	D	
3. Moderator <u>solicited, as relevant, input from Team Members</u> (e.g., using open-ended questions).	A	D	
4. Moderator <u>periodically summarized ideas, suggestions, & related these to the TIP Model®</u> as relevant.	A	D	
5. Occasionally a <u>Moderator reminds the Team Members of the purpose of the TSR sessions</u>, including that they should be <u>self-evaluating as to how they're doing in applying the TIP Model® with their own young people</u>.	A	D	
6. Moderator during some TSRs <u>should ask a TF or another Team Member to demonstrate or role play</u> an aspect of an interaction to clarify how it was applied or how a suggestion could be applied (e.g., an aspect of SODAS or In-vivo Teaching).**	A	D	

E. TSR Follow-up These items are completed based on: a) Self-Monitoring by Supervisor; or b) Consultant's or SBT's discussion with the Supervisor.	Agree	Disagree	Please make notes to: a) provide positive or corrective feedback, & b) clarify any aspects of your response.
1. The Supervisor, during or shortly after a TSR, ensures that the presenting TF has a plan for next steps with the YP (e.g., assisting the TF in prioritizing practices & strategies to best advance his/her work with the YP).**	A	D	
2. The Supervisor & the presenting TF follow-up in supervision to discuss progress on planned steps, indicators of YP's progress, & application of TIP Model® Guidelines, Core Practices, ENGAGERS, &/or other strategies.**	A	D	

Appendix A

Purpose of the *TIP Solutions Review (TSR)*

The *TIP Solutions Review (TSR)* **process** is **to provide an opportunity for your Team to collaboratively problem-solve ways to improve your Team's effectiveness** in your work with youth and young adults -- and with other relevant natural supports and formal key players in their lives.

The **purpose** of the *TSR* process is four-fold:

1. Inform and enrich the Transition Facilitator's (TF's) work with the **specific young person** being reviewed.

2. Enhance the knowledge and competencies of all of the Transition Facilitators (TFs) and other Team personnel in the integrated application of the *Transition to Independence Process (TIP) Model* Guidelines, Core Practices, ENGAGERS, Transition Domains, the concept of "Planning Partners / Necessary Connections", and other TIP Model® essential ingredients.

3. Improve the progress and outcomes of the youth and young adults being served by the Transition Team.

> The first TSR purpose statement (#1 above) often leads to the primary TF confirming or revising her strategies for advancing the engagement and/or progress of the young person being discussed.

> The second TSR purpose statement sets the occasion for all of the TFs to improve their effectiveness in working with their young people and learning to be more responsive to the young people's family members, other informal key players, and formal key players who might be relevant to the young person's progress.

> The TSR process also acquaints other Team Members with new relevant resources in the community that might be helpful to some of the young people.

4. Celebrate your Team successes in working with young people, their families, and/or other relevant informal key players in their lives.

❖ The TSR process is the only activity in the *TIP Model®* that is done without having the YA involved.

❖ *TIP Model®* fidelity requires that at least two Young People be reviewed in-depth by the entire Transition Team each month using the *YA Descriptive Outline* form.

Appendix B
Streamlining the TSR Process: Suggestions from the Field

Some Supervisors and Team Members from some various Transition Teams across the nation have provided some ways that they have streamlined aspects of the TSR process.

Preparing the *YP Descriptive Outline* for a TSR Session:
- ❖ One Transition Team dedicated one hour before the TSR for the TF(s) who will be presenting the YP to complete the YP Descriptive Outline.
- ❖ Another Team tailored the YP Descriptive Outline to match the required components of their Quarterly Reporting for the agency and for meeting Medicaid insurance reimbursement standards.

Scheduling of a YP for the TSR Session:
- ❖ One Team scheduled their TSRs, presenting TF, and young people in advance on a rotating schedule.
- ❖ Another Team's scheduling was kept more flexible so that if a TF really wanted to have a brainstorming session about one of her/his most challenging young people, the Team could accommodate this request in a timely fashion.
- ❖ Another Team attempted to schedule the TSR reviews of young people so that during each month the Team would typically review one "challenge" and one "celebration":
    - o One YP for whom a TF is having some challenges in advancing the YP so the Team Members get to collaboratively problem solve ways to assist the TF in using the TIP Model® to advance the YP more effectively.
    - o One YP that the Team could learn about the progress of the YP -- and explore and celebrate how the TF's efforts may have contributed to the YP's progress (e.g., a YP's "progress" might be a recent breakthrough such as Roberto has been managing his marijuana use so that he can function in daily life and is back in the automotive technical training program; or a YP's "progress" might be longer-term accomplishments such as Annalane's graduation from the Nursing Certification program and completed her first 2 months of her paid internship at a hospital.

Note-Taking During the TSR Session:
- ❖ A Team reported on how it used a whiteboard to take notes during the TSR sessions. The Presenting TF would then take a picture of the notes from the board.
- ❖ The Moderator for a TSR session at one Team would ask for one of the TFs to take notes that could be shared with the Supervisor and the "Presenting TF" for the YP being discussed.
- ❖ Another Team would use the same approach as is mentioned above, but the notes would be typed on a laptop computer during the session.
- ❖ **BOTTOM LINE**: The purpose of these notes, no matter how they are taken, is three-fold:
    - o Summarize discussion:
        - ▪ At times during the TSR session, the TF presenting the YP or the Moderator might ask for the "scribe" to read off a section from her/his notes so that the Team could have a summary of the discussion.
    - o Document ideas and suggested strategies:
        - ▪ A reference for the TF to have regarding the results of the collaborative problem solving for possible strategies that might improve the TF's application of the TIP Model® and her/his advancing the progress of the YP.

- A summary that the TF and Supervisor can use in their "follow-up" discussions to ensure that the TF has a prioritized plan for moving ahead in her/his work with the YP.
- Sometimes these notes prove very helpful to a TF in her/his documenting the clinical case notes that are required for a quarterly report or for other documentation in the electronic health record.

TF and Supervisor Follow-Up:

During some of the TSR sessions, there is time for the TF and the entire Team to prioritize her/his <u>plan of next steps in working with the YP</u>. However, often this planning needs to be done by the TF and the Supervisor shortly after the session.

- ❖ One of the Teams arranged so that the TF would meet with the Program Supervisor or Team Lead shortly after the session or the next day to review how she/he plans to move forward with the application of the TIP Model® and advancement of the YP's progress.
- ❖ This Team also did "follow along" updates during the TF's Individual Supervision meeting that occurred weekly. They would discuss how the YP is progressing, what practices and strategies the TF was using, and what other strategies, if necessary, might the TF use next.
- ❖ A Supervisor at one of the sites suggested that they would often have a brief follow-up report at a TSR session on how a YP is doing after the original review of 2 or 3 months ago.

TEAM MEMBER INVITATION

If you as a TF or Supervisor have any ways that your Team has streamlined the TSR process to make It more efficient, useful or effective, please share such with your Lead TIP Model® Consultant (e.g., Elijah, Coral, Monique, Adele), Joseph Solomita (jsolomita@starsinc.com), and/or Hewitt B. "Rusty" Clark (RClarkTIP@gmail.com).

TEAM SUPERVISORS, TIP MODEL® ASSESSORS / CONSULTANTS

- ❖ Other TSR-related documents are:
  - o *TSR Monitoring & Mentoring Checklist* 091019
  - o *TSR Protocol for Using the TIP Solutions Review* 091019
    - *TSR – YP Descriptive Outline TYPE-ON Form 031218 LOCKED.docx*
    - *TSR – SAMPLE YP Descriptive Outline PDF 031218*
  - o *TSR SurveyMonkey User Guide for Assessor/Consultant & Research Liaison* 091019
  - o *TSR SurveyMonkey* (SBHG Research Dept. has current version of Survey)
- ❖ Please always make sure that you're using the most updated tools and documents.
  - o Refer to the date at the end of the electronic file name and also the version date on the hard copy.
  - o These should be on the *TIP Model®* website (www.TIPstars.org) or contact your Lead National Consultant, Assessor, and/or Joseph Solomita (jsolomita@starsinc.com).