OVERVIEW

The University of Kansas (KU) Supported Education Toolkit is meant to provide information and assistance for fidelity reviewers and supported education implementation sites. This toolkit is divided into four sections. Section 1 introduces and provides information on the KU supported education fidelity scale as well as instructions and protocols. Section 2 provides sample tools for fidelity reviewers that assist with conducting supported education fidelity reviews. Section 3 provides sample tools for implementation sites that assist with tracking essential supported education information. Section 4 is a bibliography of supported education related articles or books.

The average supported education fidelity review should take between one and two days. It is recommended that new fidelity reviewers receive mentorship from experienced supported education fidelity reviewers familiar with the toolkit and protocols. Receiving mentorship may help to avoid implementation drift and increase the speed of implementation in general.

If you have feedback or questions regarding this fidelity scale please contact Trevor Manthey, LMSW, Ph.D. Candidate at trevormanthey@gmail.com.
# Supported Education Toolkit 3.0

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SECTION 1:
The Supported Education Scale and Protocol
The evidence for supported education thus far does not constrain program development into one narrow model. Therefore, the aim of the KU SEd fidelity scale is to provide a principle-driven model that is likely to be of use in a variety of settings and programs. As used here "fidelity" means concordance with principles rather than adherence to key elements of programs proven effective.

The KU Supported Education fidelity scale was initially developed through using an expert panel of six researchers, a review of other fidelity scales currently available, individual interviews (with general consumers, students with psychiatric disabilities, community mental health staff, and community college staff), three large focus groups, and a review of the literature. The KU SEd fidelity scale has been piloted at three separate community mental health centers in Kansas and revised based on the piloting process in these centers. The scale has also been adopted by SAMHSA and has been used by other supported education agencies across the country.

Current revisions to the scale were based on a national study of integrated supported education and supported employment programs (Manthey, et al., 2012), a focus group of nine SEd provider agencies in Kansas, and a panel of seven KU researchers. The aim of the latest revision was to make the scale more adaptable to a variety of integrated models (such as an integrated supported education/employment model) which is consistent with the original adaptability goals of the scale.

Reference:
Current KU SEd Fidelity Scale Iteration (3.0)

Iteration 3 (3.0)

Previous KU SEd Fidelity Scale Iterations

Iteration 2 (2.0)

Iteration 1 (1.0)
## Staffing and Organizational Factors

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<tbody>
<tr>
<td><strong>1. Provides All Phases:</strong> The person providing supported education services provides all phases of the supported education process (referral, engagement, assessment, enrollment support, and ongoing educational support).</td>
<td>SEd Worker provides only one phase of education services</td>
<td>SEd Worker provides two phases of education services</td>
<td>SEd Worker provides three phases of education services</td>
<td>SEd Worker provides four phases of education services</td>
<td>SEd Worker provides all five phases of education services</td>
</tr>
<tr>
<td><strong>2A. Integration with Mental Health Treatment:</strong> The Supported Education team is integrated with mental health treatment as illustrated by: (1) attending at least one case-management team meeting per month, (2) attending all CM team meetings quarterly, and (3) having at least three client-related contacts per week with CM’s.</td>
<td>SEd staff meet one or zero inclusion criterion</td>
<td>SEd staff meet two out of three inclusion criteria</td>
<td>SEd staff meet all three inclusion criteria</td>
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<tr>
<td><strong>2B. Integration with Mental Health Treatment:</strong> The Supported Education team is integrated with mental health treatment as illustrated by: (1) attempting to recruit new clients at CM team meetings, and (2) coordinating services at CM team meetings. 3) During individual CM contact, inquiring about possible new referrals from case managers’ caseloads.</td>
<td>SEd staff meet one or zero inclusion criterion</td>
<td>SEd staff meet two out of three inclusion criteria</td>
<td>SEd staff meet all three inclusion criteria</td>
<td></td>
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<tr>
<td><strong>3. Educational Outcomes:</strong> The Supported Education team: (1) tracks outcomes including: (a) % in education (b) % completed (c) GPA (d) withdrawals/terminations, (e) # of credits, and (f) type of degree program. (2) the outcomes tracked and shared on a semi-annual basis at a minimum (3) the outcomes tracked are shared with stakeholders (including clients and community members) (4) the outcomes tracked are shared with staff (5) the outcomes tracked include both individual and aggregate data.</td>
<td>Meet one out of five outcome related elements</td>
<td>Meet two out of five outcome related elements</td>
<td>Meet three out of five outcome related elements</td>
<td>Meet four out of five outcome related elements</td>
<td>Meet all five outcome related elements</td>
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</table>
### Supported Education Toolkit 3.0

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<tr>
<th>4A. Caseload Size:</th>
<th>Integrated caseloads are 81 or greater</th>
<th>Integrated caseloads are between 61-80</th>
<th>Integrated caseloads are between 41-60</th>
<th>Integrated caseloads are between 26-40</th>
<th>Integrated caseloads are at or less than 25</th>
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<tr>
<td>Supported Education workers have a total caseload of 25 or less for an integrated model (combined supported employment and supported education caseload).</td>
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<td>-OR-</td>
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<thead>
<tr>
<th>4B. Caseload Size:</th>
<th>Nonintegrated caseloads are 91 or greater</th>
<th>Nonintegrated caseloads are between 71-90</th>
<th>Nonintegrated caseloads are between 51-70</th>
<th>Nonintegrated caseloads are between 36-50</th>
<th>Nonintegrated caseloads are at or less than 35</th>
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<tr>
<td>For the freestanding (nonintegrated) model: Supported Education workers have a total caseload of 35 or less.</td>
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<tr>
<th>5. Supervisor's Duties:</th>
<th>One out of five elements are present</th>
<th>Two out of five elements are present</th>
<th>Three out of five elements are present</th>
<th>Four out of five elements are present</th>
<th>Five out of five elements are present</th>
</tr>
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<tbody>
<tr>
<td>Supported Education supervisor ensures program objectives are met by: (1) Providing weekly supervision, (2) communicating with mental health service supervisors quarterly to resolve programmatic issues and to encourage referrals to the SEd program, (3) provides field mentoring every quarter, (4) provides individualized feedback regarding outcomes, and (5) helps develop new strategies and ideas to help clients achieve their educational goals.</td>
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<tr>
<th>6. Range of Services:</th>
<th>Team offers support for only one or two educational activities</th>
<th>Team offers assistance for some activities but not a full range</th>
<th>Team offers a full range of support for educational activities (there is no evidence the team excludes any type of educational pursuit)</th>
</tr>
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<tr>
<td>Supported Education program offers services individualized for the specific educational needs of each consumer meant to further career development (e.g. GED/HS diploma, post-secondary education, vocational school, English as a Second Language, basic educational skills, online programs, apprenticeships, etc).</td>
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</table>
## Supported Education Toolkit 3.0

### Referral and Engagement

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<thead>
<tr>
<th>7. <strong>Screening</strong>: Consumers are not screened out of Supported Education Services based on formal or informal educational or non-educational eligibility requirements such as literacy, substance use, language barriers, symptoms, perceived readiness, motivation, age, hygiene, medication compliance, etc</th>
<th>1</th>
<th>2</th>
<th>3</th>
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<tr>
<td>There is evidence that formal or informal screening regularly occurs or has occurred more than two times.</td>
<td></td>
<td></td>
<td>There is evidence that informal or formal screening has occurred one or two times.</td>
<td></td>
<td>There is no evidence of informal or formal eligibility requirements. All consumers are eligible &amp; actively encouraged to participate in the program.</td>
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<tr>
<th>8. <strong>Engaging Communication With All Clients</strong>: Case-managers and supported education workers regularly and frequently talk with all CSS clients about education as an option (e.g. ask clients if they ever thought about it, convey education as a possibility, discuss pro’s and con’s, ask clients about their past experience with education, discuss connections between employment and educational goals, and discuss what their future educational goals might be if they were to pursue it)*</th>
<th>1</th>
<th>2</th>
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<tr>
<td>No structured mechanized and evidence of conversation beyond the SEd referral</td>
<td></td>
<td></td>
<td>There is no structured mechanism in place but there is evidence that conversation(s) took place.</td>
<td></td>
<td>There is a structured mechanism used that ensures conversations take place about education.</td>
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<tr>
<th>9. <strong>SEd Program Awareness</strong>: Individuals who receive agency services are aware of the educational services provided as evidenced by displays of SEd program materials (posters, brochures, flyers) that are highly visible and are present in multiple locations that consumers frequent.</th>
<th>1</th>
<th>2</th>
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<tbody>
<tr>
<td>Materials have not been developed</td>
<td>Materials are developed but are not displayed or distributed</td>
<td>Materials are displayed in one location</td>
<td>Materials are displayed at multiple locations that are easily accessible</td>
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<table>
<thead>
<tr>
<th>10A. <strong>Services Begin Quickly</strong>: Individuals seeking supported education services receive their first contact by the supported education team within one week of referral.</th>
<th>1</th>
<th>2</th>
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<tr>
<td>&lt;45% of cases have a visit the first week.</td>
<td>45-59% have a visit the first week.</td>
<td>60-74% of cases have a visit the first week.</td>
<td>75-89% of cases have a visit the first week.</td>
<td>90% or more of cases have a visit the first week.</td>
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<table>
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<tr>
<th>10B. <strong>Services Begin Quickly</strong>: Individuals seeking supported education services have one concrete educational activity completed within one month of referral.</th>
<th>1</th>
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<tbody>
<tr>
<td>&lt;45% of cases have completed a concrete educational activity within 30 days of referral</td>
<td>45-59% have completed a concrete educational activity within 30 days of referral</td>
<td>60-74% of cases have completed a concrete educational activity within 30 days of referral</td>
<td>75-89% of cases have completed a concrete educational activity within 30 days of referral</td>
<td>90% or more of cases have completed a concrete educational activity within 30 days of referral</td>
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</table>
11. **Assertive engagement and outreach:** (phone, mail, email, community visits) occurs with new referrals or when a participant stops participating in SEd services until the individual acknowledges they do not want to continue SEd services or re-engage. The following elements should be in place: 1) a systematic means of tracking outreach efforts 2) SEd workers make a minimum of five outreach attempts within one month 3) Has contacted the primary treatment team about the non-engagement.

<table>
<thead>
<tr>
<th>1 or 0 elements are present</th>
<th>2 out of 3 elements are present</th>
<th>3 out of 3 elements are present</th>
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<tr>
<td>Three or less domains are documented and/or documentation is not updated regularly</td>
<td>Four domains are regularly assessed.</td>
<td>Five domains are regularly assessed.</td>
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<tr>
<td>None of the domains are present</td>
<td>One of the domains are present in either charts or consumer comments</td>
<td>Two of the domains are present in either charts or consumer comments</td>
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<tr>
<td>Zero or one criterion is/are updated quarterly.</td>
<td>Only two criteria are updated quarterly.</td>
<td>Only three criteria are updated quarterly.</td>
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<tr>
<td>All five criteria are updated quarterly.</td>
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12. **Written Assessment:** Educational Support Workers assess participants’ (1) educational interests, (2) talents, skills, environmental supports, resources (3) preferences, (4) academic history, (5) future academic aspirations, (6) barriers to education, and (7) accommodations/support needs and documents their assessment using an educational assessment tool. The educational assessment is updated quarterly with new information based on changes in the participants’ life situation.

13. **Disclosure:** Educational support workers assist participants in making an informed decision regarding disclosure to school staff, faculty and students. An informed decision includes the following: (1) disclosure is not required (2) offer to discuss pro’s and con’s including how the decision influences access to accommodations (3) discuss what/how information may be appropriately disclosed including examples (4) workers discuss disclosure and revisit it at least quarterly.

14. **Educational Goal Planning:** Educational Support Workers provide individualized educational goal planning that is updated quarterly and meet these criteria: (1) consumer preferences; (2) includes long-term goal(s), (3) short-term action steps, (4) date(s) for completion, and (5) responsibilities.
### Supported Education Toolkit 3.0

#### Enrollment/Ongoing Support

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<tr>
<th>Essential Enrollment/Ongoing Supports:</th>
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<tr>
<td>Services are provided to 59% or fewer of participants</td>
<td>Services are provided to 60% - 69% of participants</td>
<td>Services are provided to 70% - 79% of participants</td>
<td>Services are provided to 80% - 99% of participants</td>
<td>Services are provided to 100% of participants</td>
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#### Supplemental Enrollment/ Ongoing Supports:  

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<th>Supplemental Enrollment/ Ongoing Supports:</th>
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<tbody>
<tr>
<td>Services are provided to 59% or fewer of participants with identified need</td>
<td>Services are provided to 60% - 69% of participants with identified need</td>
<td>Services are provided to 70% - 79% of participants with identified need</td>
<td>Services are provided to 80% - 99% of participants with identified need</td>
<td>Services are provided to 100% of participants with identified need</td>
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#### Ongoing Supports:  

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<th>Ongoing Supports:</th>
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<tr>
<td>Assistance is provided monthly to ≤ 29% of program participants.</td>
<td>Assistance is provided monthly to 30-49% of program participants.</td>
<td>Assistance is provided monthly to 50-69% of program participants.</td>
<td>Assistance is provided monthly to 70-89% of program participants.</td>
<td>Assistance is provided monthly to 90-100% of program participants.</td>
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#### Financial Assistance:  

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<th>Financial Assistance:</th>
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<th>2</th>
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<tr>
<td>Only 1 out of 5 financial aid types of assistance are delivered.</td>
<td>2 out of 5 financial aid types of assistance are delivered.</td>
<td>3 out of 5 financial aid types of assistance are delivered.</td>
<td>4 out of 5 financial aid types of assistance are delivered.</td>
<td>5 out of 5 financial aid types of assistance are delivered.</td>
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19. **Liaison Services**: If disclosure occurs and is based on client identified need and preference, the supported education worker(s) serve as a proactive liaison to educational programs in order to address participant and programmatic issues. Collaboration and communication with relevant campus personnel occurs on a consistent and regular basis.*

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<tr>
<td>Assistance is provided to &lt;= 29% of program participants.</td>
<td>Assistance is provided to 30-49% of program participants.</td>
<td>Assistance is provided to 50-69% of program participants.</td>
<td>Assistance is provided to 70-89% of program participants.</td>
<td>Assistance is provided to 90-100% of program participants.</td>
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20. **Individualization:** Educational Support Workers provide support that is individualized by participant’s preferences and needs.*

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<td>Assistance is provided to 70-89% of program participants.</td>
<td>Assistance is provided to 90-100% of program participants.</td>
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21. **Mobile/immediate supports**: are available when the student requires it. A supported educational worker is able to respond when a participant needs immediate support (travel to educational institution).

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<td>Assistance is provided to 70-89% of program participants.</td>
<td>Assistance is provided to 90-100% of program participants.</td>
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INTRODUCTION

Supported Education is an emerging best practice in the field of psychiatric rehabilitation. The primary goal of Supported Education is to provide opportunities, resources and support to people with psychiatric disabilities in order to gain admittance to and succeed in the pursuit of education. Education is an activity that enables individuals to gain access to meaningful employment, a new identity, and the fulfillment of life goals.

Consumers of mental health services and service providers are increasingly recognizing the role of supported education in recovery. Educational involvement parallels recovery; both are on-going processes and both prepare one for new challenges in life. Unfortunately, for people experiencing psychiatric disabilities, involvement in post-secondary or other continued education, though frequently desired, is seldom achieved. For many individuals, the completion of high school, college and trade apprenticeship is interrupted by the onset of identifiable psychiatric symptoms manifested in the young adult years.

Although existing models of Supported Education vary, The University of Kansas Supported Education Group upholds the following as the framework for best practices in Supported Education:

- Mental health center (MHC) promotes Supported Education throughout the organization and in the greater community
- Supported Education activities occur on campus
- Variety of activities are offered to increase consumer/student confidence & explore educational possibilities
- Mental health center sponsored segregated activities are not required and consumer chooses from an array of other non-segregated educational options
- Clinicians, case managers, treatment teams are active in encouraging education with consumers
- Enrollment and individualized educational supports are provided
- Support groups or peer-to-peer assistance is available and accessible
- MHC provides necessary help to acquire needed resources on an individualized basis
- No exclusion based on mental health or personal considerations for participation in activities of Supported Education
**What is meant by “participant”:**

Throughout the protocol and on the Fidelity instrument, the term participant is used. Consumer is a term that is commonly used to describe individuals who receive mental health services. However, while developing this program it became apparent that a term was needed to identify individuals in the Supported Education Program, particularly in agencies providing multiple services.

**Overview of the scale:**

The Supported Education Fidelity Scale contains program-specific items that have been developed to measure the implementation of Supported Education programs. Each item on the scale is rated on a 5 point rating scale ranging from 1 (*not implemented*) to 5 (*fully implemented*). The standards used for establishing the anchors for the fully implemented ratings were determined through a variety of expert sources and empirical research.

**What is rated?**

The scale is rated on current behavior and activities, not planned or intended behavior. For example, in order to get the full credit for Item 2 (Supported Education Team/Specialist), it is not enough that the program is currently planning to hire personnel to fill the position.

**Unit of analysis:**

The scale is appropriate for assessing fidelity to Supported Education practices at the agency/program level. Clinicians are rated as a group rather than on an individual basis.

**How the rating is done:**

The Supported Education Fidelity assessment is conducted in person at the program site. The assessment is scheduled in cooperation with the program being assessed. The Supported Education Fidelity assessment requires a minimum of 12 hours to complete and is typically scheduled over the course of two days.
The data collection procedures include chart review, review of educational handouts, and semi-structured interviews with the Supported Education program coordinator, Supported Education practitioners, other clinical staff in the agency, and participants in the Supported Education Program.

**Interviews:**

It is recommended that if the Supported Education program has 3 or fewer Supported Education specialists, attempts should be made to interview all. If the program is larger than a staff of 3, try to interview as many as possible. However, a minimum of 3 specialists should be sampled for interview. It is recommended that interviews with Supported Education specialists be conducted in a group setting.

It is recommended that other clinical staff (i.e. case managers and therapists) working in Community Support Services and with the Supported Education target population be randomly selected and interviewed. Group interviews should be conducted, selecting at least 1 therapists and 1 case managers from each referring team/or at least a total of 3 case managers as respondents.

It is recommended that the Fidelity assessors should aim to interview at least 5 consumers who have received or are currently receiving Supported Education services. If possible, interviewing 3 consumers who are not currently receiving services is also recommended. The ideal is that consumers from the Supported Education program are randomly selected.

**Chart Review:**

Some items on the Fidelity assessment require chart review. It is recommended that 10% of participant charts be randomly selected and reviewed (from both established and newly enrolled participants) with a minimum of 10 charts. The reviewer may choose to review more charts if compelled to do so.

**Who does the rating:**

Using the University of Kansas (KU) Fidelity Scale, assessments can be made by both external groups as well as by the organization implementing Supported Education. Both types of assessments are recommended. If it is administered internally, it is important for the ratings to be made objectively and based on hard evidence. Agencies are encouraged to select a review process that fosters objectivity in ratings, e.g., by involving a staff person who is not centrally involved in providing or supervising Supported Education services. With regard to external reviews, there is a
distinct advantage in using assessors who are familiar with the program, but at the same time are independent. The goal in this process is the selection of objective and competent assessors.

Fidelity assessment should be administered by persons who have experience and training in interviewing and data collection procedures, including chart reviews. In addition, raters need to have an understanding of the nature and critical ingredients of Supported Education and population served. It is recommended that all Fidelity assessments be conducted by at least two raters in order to increase reliability of the findings.

**Missing data:**

The KU Fidelity Scale is designed to be completed fully, with no missing data on any items. If information cannot be obtained at the time of the site visit, it will be important for the raters to collect the data by following up with phone calls, emails, or additional site visits. It is critical that raters record detailed notes of responses given by interviewees.

### FIDELITY ASSESSOR CHECKLIST

**Before the Fidelity Site Visit:**

- **Review the sample cover sheet.**
  This sheet is useful for organizing the University of Kansas Supported Education Fidelity assessment, identifying where the specific assessment was completed, along with general descriptive information about the site. You may need to tailor this sheet for your specific needs (e.g., unique data sources, purposes of the Fidelity assessment).

- **Create a timeline for the Fidelity assessment.**
  Fidelity assessments require careful coordination of efforts and good communication. Therefore, it may be useful to list all the necessary activities leading up to and during the visit as well as target dates for completion of these tasks.

- **Establish a contact person at the program.**
  You should identify one key person with whom you arrange your visit and communicate with before the fidelity review. Typically this will be the Supported Education coordinator. Exercise common courtesy by scheduling well in advance and respecting the competing time demands on clinicians and other staff.
Establish a shared understanding with the site being assessed.
It is essential that the Fidelity assessment team communicates to the program the goals of the Fidelity assessment. Assessors should inform the program site about who will see the report, whether the program site will receive this information, and what information will be provided. The most successful Fidelity assessments are those in which the shared goal among the assessors and the program site is to understand how the program is progressing according to evidence based principles. If administrators or line staff fears loss of funding or a damaged image if they don’t score well, then the accuracy of the data may be compromised. It is particularly important that Fidelity assessors explain during a baseline interview that the goal is to obtain an initial picture for the program, and that high fidelity is not expected in the early stages of implementation.

Indicate what you will need from respondents during your Fidelity visit.
In addition to the purpose of the assessment, you will need to briefly describe what information you will need, who you will need to speak with, and how long each interview or visit will take to complete. The Fidelity visit will be most efficient if the Supported Education coordinator gathers the following information in advance.

Organizational Policies
The Mental Health Agency will provide information on any policies concerning confidentiality or other organizational policies that will need to be followed. The Fidelity Review Team agrees to follow all organizational guidelines and policies set forth by the Agency. Any releases of information or consent forms for access to client files or interviews will be obtained by the agency receiving the KU Fidelity Review.

Information about the Supported Education Program
The agency will provide the following information:

- A copy of the program brochure
- Mission statement of program (philosophy)
- List of names of Supported Education specialists
- Roster of Supported Education consumers assigned to each practitioner
- A written description of the team’s admission criteria
- Number of consumers admitted to the Supported Education program, per month, for the last 12 months
Assessments focusing specifically on education

Number of consumers terminated from the Supported Education program in the last year, broken down in these categories:

1) Left the program because of significant improvement/recovered
2) Graduated from school/college
3) Dropped out of school/college
4) Closed because they refused services or unknown whereabouts to team
5) Deceased within the last year
6) Other (explain)

Alert your contact person that you will need to sample 10% of client charts, with a minimum of ten.
It is preferable from a time efficiency standpoint that the charts be drawn beforehand, using a random selection procedure. Obviously, a program can falsify the system by hand picking charts and/or updating them right before the visit. If there is a shared understanding that the goal is to better understand how a program is implementing services, this is less likely to occur. Request from the agency to provide a room where chart review can be conducted by KU Fidelity Review Team staff.

Alert your contact person that you will need to interview at least 1 clinicians from both case management and therapy services through the Community Support Program.
Group interviews will be conducted with clinicians who have familiarity with the Supported Education program offerings. The importance of having a multi-disciplinary approach will help to assess the Supported Education program’s communication, collaboration and outreach to clinical staff regarding opportunities for consumers on case management and therapy caseloads.

Alert your contact person that the Fidelity assessment includes interviews with at least 5 consumers who are currently receiving or have received in the recent past Supported Education services.
The fidelity assessment should include interviewing with at least 5 consumers who have received or are receiving Supported Education services. Reassure the agency that organizational policies (e.g. releases of information, confidentiality, etc.) will be followed.

**Interviews Summary:**

Agency will arrange the following interviews. All interviews will last approximately 1 hour.

- Group interview with 5 consumers who currently receive or have received supported education services.
- Group interview with 3 Supported Education specialists.
During the Fidelity Site Visit:

Overview:

The strategy in conducting program fidelity assessments is to obtain data from as many sources as possible. When all these data sources converge, then one can be more confident in the validity of the ratings. However, experience suggests that the sources often disagree. If discrepancies between sources occur (for example, if the program leader indicates a higher rate of use of a particular technique than is documented in the records or observed in the session), query the program director/coordinator, practitioners, or team leader to get a better sense of the program’s performance in a particular area. The most common discrepancy is likely to occur when the interview with a Supported Education program coordinator &/or specialist gives a more idealistic picture of the program’s functioning than do chart reviews, observational data and interviews. For example, on Item 9-Enrollment Supports, the Supported Education specialists may report that they often spend their time working with the consumer at the academic institution, while the interview or observation may show that consumer contact takes place largely in the mental health agency office. To understand and resolve this discrepancy, the assessor may go back to the Supported Education specialists and say something like, “Our chart review shows consumer contact is office-based the majority of the time. Since you had reported you often provided pre-enrollment services in the community, at the college, we want your help to understand the difference.”

Tailor terminology used in the interview to the site:

For example, if the site uses the term “member” for participant, use that term. If “practitioners” are referred to as workers, use that terminology. Every agency has specific job titles for particular staff roles. By adopting the local terminology, the assessor will improve communication.

Purpose and schedule:

The fidelity assessors should begin the process of data gathering by sharing with the Supported Education program coordinator the purpose for the visit and the schedule for the day. The schedule will then include interviews with Supported Education specialists, case
managers and clinicians, and with consumers who receive Supported Education services. Charts and/or other written sources such as progress notes, educational assessments, educational goal plans, etc. documenting the Supported Education sessions will be reviewed.

**After the Fidelity Site Visit:**

*Rate the Fidelity scale:*

The same day of the site visit, assuming there are at least two assessors, each should independently rate the Supported Education Fidelity scale. Within 24 hours the assessors should then compare their ratings and resolve any disagreements. Determine a consensus rating for each item.

*Tally Scores:*

The Fidelity assessors should tally the item scores and determine which level of implementation was achieved.

*Data follow up:*

If necessary, follow up on any missing data (e.g., phone calls, email to the program site). This would include a discussion with the Supported Education program coordinator about any discrepancies between data sources that arise after the visit has been completed. In cooperation with all assessors, make necessary adjustments to the Fidelity scores based on the completed data.

*Fidelity Report:*

Send a fidelity report to the program site. This report may include an explanation of scores on the Fidelity scale and interpretation of the assessment, highlighting both strengths and weakness/challenges. The report should be informative, factual, and constructive. If the Fidelity assessment is given repeatedly to the same program, it is useful to provide a visual representation (i.e. bar/pie charts, Excel spreadsheet) which graphs the program’s progress on the Fidelity scores over time. Those receiving this report will vary but typically will include the key administrators involved in the assessment.
ITEM DEFINITIONS AND SCORING

Overview

The University of Kansas (KU) Supported Education Fidelity assessment evaluates the services provided to individuals in recovery from psychiatric disabilities and the practitioners who are responsible for their mental health treatment and aid in their goals towards recovery. The KU Fidelity assessment specifically focuses on whomever the program coordinator designates as the target population (persons who have expressed a desire to pursue education). The mental health organization may have a much larger number of consumers who are candidates for Supported Education services, but that is a question of penetration, not fidelity. At the outset of the Fidelity assessment, in fact even before the day of the site visit, the Fidelity assessors should make clear which consumers are Supported Education recipients and which staff are designated as Supported Education staff.

Rating

Some of the items on the KU Supported Education Fidelity scale call for a calculation of percent of which a particular element of Supported Education is documented on standardized charts. This methodology implies that documentation is critical to evidence-based practice. While documentation is an important ingredient, poor documentation for an item does not mean that there is a complete lack of fidelity, nor does excellent documentation guarantee high fidelity of implementation. Fidelity assessors should integrate their observations from multiple sources to reach a reasonable judgment about the ratings for each item. To achieve a “5” (full implementation) all data sources (program leader, practitioners, consumers, clinicians, family members and charts) should agree that the item is fully implemented. If most, but not all, of the practitioners understand and follow the principle or intervention measured by an item, then ordinarily that item would be rated “4”. If the organization cannot produce any written documentation whatsoever for implementation of an item, the item ordinarily should not be scored higher than a “3”. Rate “3” if the documentation is missing, but some practitioners can explain the principle and can give specific examples during the interview. Rate “1” if the documentation is missing and practitioners cannot articulate the underlying principles. If sources contradict each other fidelity reviewers are to seek to clarify the contradiction with the supervisor and other relevant parties. If a resolution is unattainable, the rater will need to score it accurately as possible based on the sum of the evidence collected.

Data Collection
Each item of the fidelity scale is followed by a definition and a rationale. There is also an explanation of the data sources needed for each item and probe questions to be asked in the interviews. Information about the Supported Education program will be gained from the following sources:

**Program Coordinator/Administrator/Team Leader interview**

*Definition:* One clinical administrator is designated as team leader and/or administrator for the Supported Education program. The portion of this person’s time devoted to Supported Education program is dependent on the size of the program. This person’s role includes fostering agency support and awareness for the Supported Education program in the following areas:

- Monitor and improve the quality (fidelity) and quantity (penetration) of Supported Education implementation at the agency
- Display of written materials
- Inform staff, consumers, and family of program goals, services and outcomes
- Monitor the referral of eligible person to the Supported Education program
- Encourage the use of Supported Education services offered by the program
- Monitor and improve the quality (fidelity) and quantity (penetration) of supported education implementation at the agency
- Monitor and track caseloads
- Provide or arrange for training and technical assistance for practitioners
- Arrange and staff group supervision and field mentoring for Supported Education staff
- Serve and function as a team member and facilitate in group supervision
- Recognize educational success with team, consumers and throughout agency
- Serve as advocate for program and program participant within agency and in community

*Process:* The first question is whether the organization has someone who has a title of Supported Education coordinator or equivalent. This should be determined prior to the Fidelity site visit.

**Supported Education Specialist/Worker interview**

*Definition:* One or more persons who deliver direct (face-to-face) Supported Education services to people who receive services from the CSS program. This person(s) role includes activities such as:
- Be accountable to senior management regarding Supported Education program services and outcomes
- Carry a Supported Education caseload and work directly with consumers
- Serve as campus liaison/advocate for program and program participants
- Assist consumers to gain confidence and familiarity in the campus environment
- Assist persons in course selection
- Assist in securing individualized educational supports/resources (tutors, supplies, financial aid, navigating campus, enrollment, transportation, etc.)
- Be responsible for the documentation of Supported Education activities

**Process:** The first question is who (what staff) serves as a Supported Education specialists/worker. From this roster, calculate the number of full-time equivalent (FTE) staff and confirm with program coordinator. This should be determined prior to the site visit.

**Community Support Service Clinicians interview**

**Definition:** Staff clinicians including at least 2 therapists and 2 case managers as respondents working in CSS with the Supported Education target population will be interviewed in a group setting. This clinician’s role includes activities such as, but limited to:

- Engagement strategies to establish therapeutic relationship with consumers
- Treatment plan / Strengths Assessment
- Establishment of treatment goals / personal goal plans
- Referrals to Supported Education program
- Working in collaboration with Supported Education staff to offer individualized supports and resources to assist consumers to achieve stated goals
- Monitoring of progress towards treatment / personal goals of consumers
- Advocacy for consumers on case load
- Documentation activities regarding assessment, treatment plan and progress

**Process:** With the assistance of the Program Coordinator calculate the total FTE therapists and FTE case management staff. At least 2 therapists and at least 2 case managers should be selected that have experience with a person on their case loads who are receiving or have received Supported Education services. This should be determined prior to the site visit.
Participant Interview

**Definition:** One or more persons who receive or have recently received direct Supported Education program services. This person(s) role includes activities such as:

- Working in partnership with the Supported Education practitioner towards achieving personal educational goals
- Active in identifying, choosing, securing and sustaining personal educational goals

**Process:** The fidelity assessment should include interviews with at least 3 participants who have received or are receiving Supported Education services. Reassure the agency that organizational policies (e.g. releases of information, confidentiality, etc.) will be followed. Participants to be interviewed should be selected by the Supported Education Program Coordinator prior to the site visit. Introduce yourself to consumer(s) being interviewed; explain the purpose of the interview; and very briefly provide a short overview of the rationale for gathering data to consumers interviewed.

Agency Documents

The Supported Education team employs agency charts and in-field tools to measure progress towards Supported Education goal achievement and other outcomes by program recipients. The following will serve as sources of information:

- Agency medical charts
- CSS Treatment Plan
- Referral tool to Supported Education services
- Supported Education Roster
- Progress Notes
- Educational Interest Inventory
- Educational Assessment
- Educational Goal Plan
- Client Status Reports

**Process:** Some items require chart review for rating the Fidelity Scale. This assessment involves the examination of 10% of charts (with a minimum of 10) of Supported Education participants. Ideally, the charts are randomly selected.
**Staffing and Organizational Factors**

1. Provides All Phases

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<td>1. The person providing supported education services provides all phases of the supported education process (referral, engagement, assessment, enrollment support, and ongoing educational support).</td>
<td>SEd Worker provides only one phase of education services</td>
<td>SEd Worker provides two phases of education services</td>
<td>SEd Worker provides three phases of education services</td>
<td>SEd Worker provides four phases of education services</td>
<td>SEd Worker provides all five phases of education services</td>
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**Definition & Rationale:** The same SEd staff person provides all services from referral to ongoing support to each client. It is important to have one staff person work through all phases of the SEd process with the client rather than the client working with different staff for various stages of the process.

**Item Rating:** Determine if the phases of service listed are typically delivered by one staff person to one client. If all phases are typically and provided by one SEd staff member, that would warrant a rating of 5. This item is trying to capture whether or not the philosophy of one staff working through the entire process with one client is used. If some of the SEd staff provide all 5 phases, but some SEd do not, score this item by averaging each individual staff’s score (e.g. if 2 staff provide all 5 phases of service, while one staff only provides 2 phases, the rating would be a 4).

**Methods:** Interview the SEd staff, the SEd supervisor, clients and case managers.

2. Integration with Mental Health Treatment

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<td>2A. The Supported Education team is integrated with mental health treatment as illustrated by: (1) attending at least one case-management team meeting per month, (2) attending all CM team meetings quarterly, and (3) having at least three client-related contacts per week with CM’s.</td>
<td>SEd staff meet one or zero inclusion criterion</td>
<td>SEd staff meet two out of three inclusion criteria</td>
<td>SEd staff meet all three inclusion criteria</td>
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<td>2B. The Supported Education team is integrated with mental health treatment as illustrated by: (1) attempting to recruit new clients at CM team meetings, and (2) coordinating services at CM team meetings 3) During individual CM contact, inquiring about possible new referrals from case managers’ caseloads.</td>
<td>SEd staff meet one or zero inclusion criterion</td>
<td>SEd staff meet two out of three inclusion criteria</td>
<td>SEd staff meet all three inclusion criteria</td>
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**Definition & Rationale:** The SEd staff should be integrated with the mental health treatment team through participation in team meetings/group supervision and frequent, informal contact with case managers.

**Item Rating:** This item is split into 2A and 2B. The scores for A and B should be averaged so there is a single score for item 2. This item is rated by determining how the team, as a whole, functions except for criteria #A3 and B3. Criterion #A3 requires that each SEd staff person has at least 3 client related contacts with case managers per week. Criterion #B3 requires that each SEd staff asks case managers about new referrals during individual contacts with case managers. The other criteria are not concerned with which SEd staff person performs the tasks.

**Methods:** Interview SEd staff members, SEd supervisor, case managers, case management team supervisors, clients (“Is your case manager up to date about your educational progress?”), and a case management services supervisor. Also review progress notes.

### 3. Educational Outcomes

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<td>Meet one out of five outcome related elements</td>
<td>Meet two out of five outcome related elements</td>
<td>Meet three out of five outcome related elements</td>
<td>Meet four out of five outcome related elements</td>
<td>Meet all five outcome related elements</td>
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**Definition & Rationale:** Educational outcomes are tracked twice a year by the SEd team and shared with the staff and stakeholders. Outcomes tracked should include: % of agency (CSS) clients that are working with SEd; % of SEd clients that have completed their educational goal; the mean GPA of the SEd clients enrolled in school during the quarter; % of withdrawals/terminations from an educational quarter; # of credits completed by clients in the SEd program; and type of degree programs. Tracking a variety of outcomes provides the SEd program with information about the program and the clients who are served. It will provide an historical perspective of SEd services. The data collected can be used to guide program changes.

**Item Rating:** Determine if the outcomes listed are tracked regularly for the SEd program. Most often this will be the SEd supervisor, but this item does not specify who tracks the items; rather it is only concerned with whether or not the outcomes are tracked for the SEd team. For elements 2, 3 and 4: the outcomes must be shared with stakeholders, staff or a combination of those on a quarterly basis (if outcomes are shared with stakeholders one quarter and staff the next quarter the SEd team would get credit for all 3 elements). For element 1 and 5 there should be evidence that 1. A-F are collected regularly and that both individual and aggregate data is available; however, what data is distributed to which groups is not specified.
**Method:** Ask the SEd team leader for documentation of the data collection. Interview clients, SEd staff, and various stakeholders (staff at educational institutions with which the team collaborates, family members, etc.).

### 4. Caseload Size

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<td>4A. Supported Education workers have a total caseload of 25 or less for an integrated model (combined supported employment and supported education caseload).</td>
<td>Integrated caseloads are 81 or greater</td>
<td>Integrated caseloads are between 61-80</td>
<td>Integrated caseloads are between 41-60</td>
<td>Integrated caseloads are between 26-40</td>
<td>Integrated caseloads are at or less than 25</td>
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**-OR-**

| 4B. For the freestanding (nonintegrated) model: Supported Education workers have a total caseload of 35 or less. | Nonintegrated caseloads are 91 or greater | Nonintegrated caseloads are between 71-90 | Nonintegrated caseloads are between 51-70 | Nonintegrated caseloads are between 36-50 | Nonintegrated caseloads are at or less than 35 |

**Definition and Rationale:** Each SEd staff’s caseload size is 25 or fewer for programs that are integrated with the supported employment program. A caseload size of 25 or fewer is a combination of SEd and SE clients. For nonintegrated SEd programs the caseload size should be 35 or fewer. Caseload sizes must be reasonable in order to provide all phases of service to clients.

**Item Rating:** Each program will have only one score for item 4. Gather caseload sizes for each staff member that provides SEd services. Average the caseload sizes for the SEd team to determine the rating.

**Method:** Survey the SEd team members and the SEd supervisor.
### 5. Supervisor's Duties

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<td>5.</td>
<td>Supported Education supervisor ensures program objectives are met by: (1) Providing weekly supervision, (2) communicating with mental health service supervisors quarterly to resolve programmatic issues and to encourage referrals to the SEd program, (3) provides field mentoring every quarter, (4) provides individualized feedback regarding outcomes, and (5) helps develop new strategies and ideas to help clients achieve their educational goals.</td>
<td>One out of five elements are present</td>
<td>Two out of five elements are present</td>
<td>Three out of five elements are present</td>
<td>Four out of five elements are present</td>
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**Definition and Rationale:** The SEd supervisor should perform certain tasks to ensure the program objectives are met. Among these are: weekly supervision; promoting referrals among other agency supervisors; inclusion in agency supervisor meetings; field mentoring; and reviewing outcomes with the team. It is the job of SEd supervisor to assure the SEd program best practices.

**Item Rating:** Weekly supervision can be individual or group. There should be a formal means of communicating with other supervisors on at least a quarterly basis. The SEd supervisor should meet with all case management supervisors as a group at least quarterly. The SEd supervisor should provide field mentoring to each SEd staff person at least once every quarter. If field mentoring is provided, but less than once every quarter it will not count towards this rating. Examples of field mentoring included coaching on how to be a liaison to campuses, how advocate for consumer accommodations without damaging educational relationships, how to fill out a FAFSA, etc. The SEd supervisor should review individual outcomes with SEd staff at least once every six months. If less than once every six months, it will not count towards this rating. During group and individual supervision the SEd supervisor should participate in problem-solving and generation of new ideas. If the model being assessed is integrated, the field supervision should be documented as being unique to supported education.

**Method:** SEd supervisor interview, SEd staff interviews, case management supervisor interviews, observation of team meeting.

### 6. Range of Services

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<td>6.</td>
<td>The Supported Education program offers services individualized for the specific educational needs of each consumer meant to further career development (e.g. GED/HS diploma, post-secondary education, vocational school, English as a Second Language, basic educational skills, online programs, apprenticeships, etc).</td>
<td>Team offers support for only one or two educational activities</td>
<td>Team offers assistance for some activities but not a full range</td>
<td>Team offers a full range of support for educational activities (there is no evidence the team excludes any type of educational pursuit).</td>
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Supported Education Toolkit 3.0
**Definition and Rationale:** Education is rapidly changing (e.g. online education) necessitating that SEd programs maintain flexibility in service provision. SEd services prioritize services geared toward career development. Services are provided for a variety of educational programs from GED and ESL to vocational programs to college. The services are individualized and encompass a wide range of educational pursuits, too numerous to list. If the focus is primarily career development then a wide range of educational programs should be supported.

**Item Rating:** The SEd staff and supervisor should be able to provide examples of cases where they provided support for non-standard educational pursuit.

**Method:** Review documentation in the medical record; treatment plans and progress notes. Review written admission criteria, if available. Interviews with SEd staff, SEd supervisor, case managers, case management supervisors and clients.

### Referral and Engagement

7. **Screening**

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<td>7. Consumers are not screened out of Supported Education Services based on formal or informal educational or non-educational eligibility requirements such as literacy, substance use, language barriers, symptoms, perceived readiness, motivation, age, hygiene, medication compliance, etc.</td>
<td>There is evidence that formal or informal screening regularly occurs or has occurred more than two times.</td>
<td>There is evidence that informal or formal screening has occurred one or two times.</td>
<td>There is no evidence of informal or formal eligibility requirements. All consumers are eligible &amp; actively encouraged to participate in the program.</td>
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**Definition and Rationale:** There are no criteria, other than a desire to pursue educational goals, for acceptance to the SEd program. There is no evidence that characteristics, symptoms or behaviors are reliable predictors of educational success.

**Item Rating:** Formal screening is straightforward and would include any written policies for admission to the SEd program. Informal screening is more difficult to detect. To come to a determination regarding informal screening, cross-reference all the interviews, progress notes and referrals and make a judgment about the degree of informal screening. In general there should be at least 2 sources with evidence of screening in order to decrease the rating. Examples of formal screening policy that excludes individuals with substance use, poor hygiene, transportation barriers, etc. from participating in the SEd program. Informal screening includes case managers or other staff discouraging clients from working with the SEd program at the time they express interest. Telling or coaching clients to believe they need to complete other things before they are “ready” to attend school (e.g. better hygiene, cleaning apartment, stop D/A use)

**Method:** If possible review referrals to SEd and determine how many clients were accepted into SEd services. Interview: SEd staff; SEd supervisor; case management staff; case management supervisors; and clients. Also review progress notes and strengths assessments can be a good source.
8. Engaging Communication With All Clients

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<td>8. Case-managers and supported education workers regularly and frequently talk with all CSS clients about education as an option (e.g. ask clients if they ever thought about it, convey education as a possibility, discuss pro’s and con’s, ask clients about their past experience with education, discuss connections between employment and educational goals, and discuss what their future educational goals might be if they were to pursue it)*</td>
<td>No structured mechanized and evidence of conversation beyond the SEd referral</td>
<td>There is no structured mechanism in place but there is evidence that conversation(s) took place.</td>
<td>There is a structured mechanism used that ensures conversations take place about education.</td>
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**Definition and Rationale:** Qualitative research has supported the notion that more consumers would be interested in educational pursuits if they had more conversations with staff that conveyed education as a possibility. All staff should take advantage of opportunities to discuss education with clients. Case managers should make a point of addressing the issue frequently.

**Item Rating:** Use of a structured mechanism that documents discussions with clients regarding educational pursuits is highly recommended. The KU SSW tool is one option for a structured mechanism, but each agency has the option of developing their own structured mechanism.

**Method:** Review of structured mechanism is necessary for a rating of 5. Interviews with clients, SEd staff and SEd supervisor. Review agency policies. Progress notes might be another source.

9. SEd Program Awareness

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<td>9. Individuals who receive agency services are aware of the educational services provided as evidenced by displays of SEd program materials (posters, brochures, flyers) that are highly visible and are present in multiple locations that consumers frequent.</td>
<td>Materials have not been developed</td>
<td>Materials are developed but are not displayed or distributed</td>
<td>Materials are displayed in one location</td>
<td>Materials are displayed at multiple locations that are easily accessible</td>
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**Definition and Rationale:** There is a method or agency culture in place that builds awareness among clients of the SEd program and the support with educational opportunities offered. It is important for clients to be aware of the educational support offered through the agency. Even those clients that express no interest in any educational pursuit should be aware there is support available.
**Item Rating:** A tour of the facility should be done in order to determine if advertising is displayed in multiple locations. If none is found, the fidelity reviewers should ask the SEd staff if there are materials displayed and ask to be shown where the materials are displayed.

**Method:** Visual survey of the premises for posters/advertisements for the SEd program. Ask the SEd supervisor for copies of brochures/flyers for the SEd program.

10. Services Begin Quickly

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<td>10A. Individuals seeking supported education services receive their first contact by the supported education team within one week of referral.</td>
<td>&lt;45% of cases have a visit the first week.</td>
<td>45-59% have a visit the first week.</td>
<td>60-74% of cases have a visit the first week.</td>
<td>75-89% of cases have a visit the first week.</td>
<td>90% or more of cases have a visit the first week.</td>
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<td>10B. Individuals seeking supported education services have one concrete educational activity completed within one month of referral.</td>
<td>&lt;45% of cases have completed a concrete educational activity within 30 days of referral</td>
<td>45-59% have completed a concrete educational activity within 30 days of referral</td>
<td>60-74% of cases have completed a concrete educational activity within 30 days of referral</td>
<td>75-89% of cases have completed a concrete educational activity within 30 days of referral</td>
<td>90% or more of cases have completed a concrete educational activity within 30 days of referral</td>
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</table>

**Definition and Rationale:** SEd services should begin within one month of referral to the program and the first contact with an SEd staff should be within one week of referral. Once a client decides to pursue an educational goal, there should not be a long wait for a service to support the educational support. If a client is ambivalent about the educational goal waiting for services might increase the ambivalence.

**Item Rating:** 11A and 11B are averaged, resulting in one score for item 11. Concrete educational activity examples include: visit campus, financial aid application, admission application, etc. The definition of concrete educational activity is any task oriented activity that goes beyond simply talking to the participant.

**Method:** Review of referrals and progress notes will be the primary way to determine the ratings for this item. Dates from referral to first contact with SEd staff and first concrete educational activity will need to be tracked with the referral form and progress notes. Secondary sources for this item include interviews with clients, SEd staff, CM staff, and SEd supervisor.
### 11. Assertive Engagement and Outreach

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<tr>
<td>11. Assertive engagement and outreach (phone, mail, email, community visits) occurs with new referrals or when a participant stops participating in SEd services until the individual acknowledges they do not want to continue SEd services or re-engage. The following elements should be in place: 1) a systematic means of tracking outreach efforts 2) SEd workers make a minimum of five outreach attempts within one month 3) Has contacted the primary treatment team about the non-engagement.</td>
<td>1 or 0 elements are present</td>
<td>2 out of 3 elements are present</td>
<td>3 out of 3 elements are present</td>
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**Definition and Rationale:** SEd staff should outreach new clients as well as clients that stop attending the SEd program. Ideally, there will be a minimum of 5 outreach attempts within the month the client is referred to services or misses his first appointment. A variety of outreach methods can be used: phone, text, email, home visits, other frequented community locations, etc. Many clients tend to drop off treatment due unmanageable situations in the lives caused by MI symptoms, poverty, or a sense of hopelessness. It has repeatedly been shown effective to provide assertive outreach to SMI clients.

**Item Rating:** In this item you should be looking for both the quality and quantity of the outreach attempts. The quantity of outreach attempts means one month of a new referral or last meeting with a client, the SEd staff should ideally make a minimum of 5 outreach attempts. The quality of the outreach attempts refers to the means used to contact a client. Making 5 phone calls within the month is not considered a robust outreach attempt. Using a variety of methods is judged to be a better quality of service. The number of outreach attempts can of course be lower than 5 if the individual re-engages. Systematic means of tracking outreach attempts means there is a form which tracks attempts or they are consistently tracked via progress notes or other tracking mechanism. If there is evidence that outreach attempts are occurring but are not documented credit for the systematic tacking will not be given.

**Method:** Review progress notes to see if outreach attempts are documented. Also interview clients, SEd staff and the SEd supervisor.
### Assessment and Goal Planning

#### 12. Written Assessment

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<tr>
<td>12.</td>
<td>Educational Support Workers assess participants’ (1) educational interests, (2) talents, skills, environmental supports, resources (3) preferences, (4) academic history, (5) future academic aspirations, (6) barriers to education, and (7) accommodations/support needs and documents their assessment using an educational assessment tool. The educational assessment is updated quarterly with new information based on changes in the participants’ life situation.</td>
<td>Three or less domains are documented and/or documentation is not updated regularly</td>
<td>Four domains are regularly assessed.</td>
<td>Five domains are regularly assessed.</td>
<td>Six domains are regularly assessed.</td>
</tr>
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</table>

**Definition and Rationale:** Seven domains relating to the client’s educational pursuits are thoroughly assessed and documented. Thoroughly assessing all these domains can prove to be an important step for the client in choosing his or her course of study. The opportunity to compare domains ultimately might inform the client’s choice. This assessment is intended to be used to guide planning for education. The assessment should be updated quarterly.

**Item Rating:** Ask for the Supported Education programs completed assessments ahead of the fidelity review visit (if they are not kept in the medical record). This assessment needs to be updated quarterly. In anchors 2-5 “regularly” means quarterly. If it is not updated quarterly the rating should be 1. For ratings 2–5 the assessment is updated quarterly so the number of domains is the only thing being evaluated. The assessment form should have clear sections for each of the 7 domains listed.

**Method:** Review assessment forms for # of domains addressed and review frequencies of updates.

#### 13. Disclosure

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<tr>
<td>13.</td>
<td>Educational support workers assist participants in making an informed decision regarding disclosure to school staff, faculty and students. An informed decision includes the following: (1) disclosure is not required (2) offer to discuss pro’s and con’s including how the decision influences access to accommodations (3) discuss what/how information may be appropriately disclosed including examples (4) workers discuss disclosure and revisit it at least quarterly.</td>
<td>None of the domains are present</td>
<td>One of the domains are present in either charts or consumer comments</td>
<td>Two of the domains are present in either charts or consumer comments</td>
<td>Three of the domains are present in either charts or consumer comments</td>
</tr>
</tbody>
</table>
**Definition and Rationale:** Formal accommodations are available for people with disabilities. A thorough discussion of accommodations is necessary in order for the client to make an informed about disclosure of his or her disability. Disclosure of a disability is necessary in order to acquire formal accommodations under the ADA; however, formal accommodations might not be necessary in every case. Only through examination of this process can an informed decision be made for the client. Re-engaging in this discussion quarterly is useful in determining if unanticipated circumstances have arisen where accommodations might be helpful.

**Item Rating:** In order to receive a rating of 5 for this item the chart reviews and the client interviews have to be crossed referenced and have strong agreement in each of the 4 domains. The other anchors the domains have to present in one or the other, charts or client interviews.

**Method:** Review of charts including progress notes for documentation of discussions regarding disclosure. Interviews with clients, SEd staff and SEd supervisor.

### 14. Educational Goal Planning

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<tr>
<td>14. Educational Support Workers provide individualized educational goal planning that is updated quarterly and meet these criteria: (1) consumer preferences; (2) includes long-term goal(s), (3) short-term action steps, (4) date(s) for completion, and (5) responsibilities.</td>
<td>Zero or one criterion is/are updated quarterly.</td>
<td>Only two criteria are updated quarterly.</td>
<td>Only three criteria are updated quarterly.</td>
<td>Only four criteria are updated quarterly.</td>
<td>All five criteria are updated quarterly.</td>
</tr>
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</table>

**Definition and Rationale:** Goal planning is essential to the successful completion of an educational program. It should be used as a tool for the client to help keep him or her on track. The goal should be timely and specific; requiring the short-term, steps, dates and responsibilities be updated frequently.

**Item Rating:** Examples of consumer preferences include type of educational program, major, class order, schedules etc. The treatment/goal plan or Personal Recovery Plan (for Strengths Case Management agencies) should have all these domains completed quarterly.

**Method:** Review of the medical chart and SEd documentation (if some working documents are kept separately from the medical record). Interviews with clients and SEd staff can corroborate what is found in the documentation.
Supported Education Toolkit 3.0

15. Essential Enrollment/Ongoing Supports

22. At a minimum, the following services are provided for individuals beginning enrollment or continuing enrollment at an educational institution.  1) application for admission 2) financial aid 3) books and supplies 4) transportation 5) class scheduling

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<tr>
<td></td>
<td>Services are provided to 59% or fewer of participants</td>
<td>Services are provided to 60% - 69% of participants</td>
<td>Services are provided to 70% - 79% of participants</td>
<td>Services are provided to 80% - 99% of participants</td>
<td>Services are provided to 100% of participants</td>
</tr>
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</table>

Definition and Rationale: (can’t score above a certain level unless it is documented).

A participant is in the enrollment phase when they are enrolling into classes for the first time after being admitted to the SEd program or for the first time after re-enrolling in the SEd program.

1) Admission: The SEd staff should work with the client to assess: how much help the client needs with the process of applying for admission; and how much help the client wants or will accept with the process. The SEd staff should provide the level of support agreed upon with the client but be prepared to adjust the level of support as needed.

2) Financial Aid: SEd staff should offer assistance with locating sources for financial assistance (e.g. grants, loans, scholarships) and applying for financial assistance. This should be done during or before the application process, but also on an ongoing basis. The SEd staff should be aware of deadlines for applying for financial assistance from various sources.

3) Books and Supplies: SEd staff assists clients with obtaining funding for textbooks and school supplies, as well as physically obtaining these items. School supplies include equipment that might be needed for a vocational program as well as typical college supplies. Although not explicit, this item includes the SEd staff helping clients secure funding for textbooks and supplies. This type of assistance can range from financial aid to budgeting.

4) Transportation: SEd staff helps clients find resources for transportation to classes, resources (e.g. library), and school events (of interest to the client). This assistance can span the spectrum from car purchase/repair to public transportation to ride shares with other students.

5) Class Scheduling: SEd staff, as part of goal formation, should explore with client the coursework required for the degree of interest to the client. Examination of the specific courses required might have an influence on whether or not the client chooses that degree program. The assistance of the SEd is not meant to take the place of the academic advisor. The SEd should assist the client with formulating class schedules. Consideration should be given to the workload, transportation, other commitments, etc.
Supported Education Toolkit 3.0

Item Rating: All clients received these services. Total all services. If even 1 person misses one service rate down to a four. If all members of a team miss at least one service rate down to a 1. “Assistance is provided” means that assistance is offered to all clients and provided to the majority.

1) Admission: There should be documentation of any assistance provided with the application process, as well as documentation that assistance with the application process was offered in those cases where the client does not need assistance with this item.

2) Financial Aid: Types of assistance provided for this item includes gathering financial information (e.g. bank records, income tax returns), past academic records, etc. Keep in mind that includes applying for financial aid (scholarships, grants, loans, VR, etc) or multiple forms of financial aid to cover the entire cost of schooling. This item includes reconciling previous financial aid awards where the client dropped out of school and is now in default. This can involve a plethora of documentation and take a considerable amount of time.

3) Books and Supplies: In addition to securing funding for books and supplies, assistance with obtaining textbooks/school supplies can range from checking with the client to see if he or she knows where to obtain needed items to accompanying the client to actually purchase textbooks/supplies. When possible it is important for the raters to make a determination about the degree of assistance available to clients.

4) Transportation: Transportation to and from classes must be planned at the time the course schedule is planned. The SEd staff should be as involved in this aspect of education to the extent necessary, including riding the public transportation route the student will take with the client to help with acclimation. This is an area where the raters might expect to see some creativity. A red flag is when transportation is the road block to furthering education. While this is possible, no transportation is available at the time the student needs it, it should be a rare occurrence and the raters should see clear effort documented.

5) Class Scheduling: SEd staff should provide assistance to clients in determining what courses will have to be completed in order to earn the degree of interest. This usually happens fairly early in the work between SEd staff and clients or if the client decides to change his or her course of study. This is not meant to replace the role of the academic advisor from the institution where the client is pursuing his or her education. On the contrary, the SEd staff should make sure the client works with the academic advisor to assure that degree requirements are met. The SEd staff can also function to reinforce what the academic advisor recommends.

Method: * Caveat…..assessing early stage folks. Interviews with clients, SEd staff, SEd supervisor, and case managers. Progress notes and treatment plan goals are also potential sources

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### 23. Supplemental Enrollment/ Ongoing Supports

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<tr>
<td><strong>16.</strong> At a minimum, the following services are provided for individuals beginning enrollment or continuing enrollment at an educational institution. 1) familiarization with educational institution 2) introduction to campus resources and personnel 3) tutoring 4) accommodations 5) peer support</td>
<td>Services are provided to 59% or fewer of participants with identified need</td>
<td>Services are provided to 60% - 69% of participants with identified need</td>
<td>Services are provided to 70% - 79% of participants with identified need</td>
<td>Services are provided to 80% - 99% of participants with identified need</td>
<td>Services are provided to 100% of participants with identified need</td>
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Definition and Rationale: Define Enrollment in Protocol.

A participant is in the enrollment phase when they are enrolling into classes for the first time after being admitted to the SEd program or for the first time after re-enrolling in the SEd program.

1) Educational Institution: The SEd should offer to familiarize the client with physical building/campus where the client is considering attending. This offers the client the opportunity to become familiar with the physical aspect of the upcoming educational experience while with a person he or she is presumably relaxed and comfortable with.

2) Campus Resources: SEd staff should offer to make initial introductions to pertinent school personnel and resources such as computer labs, libraries, bookstore, etc. The introductions are not meant as a replacement of offerings by the school itself (e.g. orientation to the library), rather it is a way to ease the first experience with a new person or resource.

3) Tutoring: SEd staff are not intended to replace any educational resources provided by the school a client is attending or planning to attend. However, one of the primary SEd staff duties is to help clients access educational resources. This might include introductions to tutorial staff, arranging transportation to tutoring, finding financial assistance for tutoring when there is a fee, etc.

4) Accommodations: SEd staff should make clients aware of the ADA, how it might apply to them and the need for disclosure in order to be eligible for some accommodations. SEd staff should provide assistance to clients to whatever degree is necessary, including mediation and advocacy with the school or other agencies, such as VR.

5) Peer Support: Peer supports are defined as supports from others who are dealing with a mental illness or other students. Often this will occur naturally, such as sharing lecture notes with a classmate, but the SEd staff should also have other resources available to those SEd clients that are not able to access naturally occurring (e.g. NAMI, agency peer support program/groups, CRO). The SEd staff should offer to assist clients/encourage clients in finding peers that are positive influences and encourage clients in their educational paths.

Item Rating: All clients with identified need received these services. Total all services. If even 1 person misses one service rate down to a four. If all members of a team miss at least one service rate down to a 1.

1) Educational Institution: SEd staff should provide an opportunity to each SEd client for a tour of campus. This can be a group tour or individual tour. For online education this includes navigating the online site, exposure to features on the website, coaching on how to use any tools available (e.g. Blackboard, Brain-honey). Not all clients will need or want this service so if only 80% of SEd clients actually receive this service a rating of 5 would be earned. Some of the clients that do not need help with item because they will use naturally occurring resources such as campus sponsored tours, fellow students, etc. If the score is lower than 80%, but there is adequate documentation in the record that this was offered to clients, the raters have the option of increasing the score for this item.

2) Campus Resources: One of the roles of the SEd staff is to assist clients with integration into the academic environment of their choosing. As part of this the SEd staff should provide introductions to key personnel. Academic advisors that will help the client determine what requirements he or she will have to fulfill in order to successfully complete the program are vital. The library is another resource that students pursuing college will need to familiarize themselves with. The SEd staff can help with this by finding library orientations (and attending this with the client, if necessary), introducing the student to a librarian, etc.
3) **Tutoring:** Determine if there is assistance available from the SEd staff ranging from making clients aware that tutoring is available to going with the client to meet the tutor or the staff person that will be in charge of arranging tutoring. It is important to try to determine if maximum assistance is given/offered for those who could use it and if the SEd staff follows-up to see that the client actually receives tutoring.

4) **Accommodations:** SEd staff should make clients aware of the ADA and give examples of accommodations that are available to them. They should also be made aware of the office at the educational institution that deals with accommodations.

5) **Peer Support:** Peer supports are defined as supports from others who are dealing with a mental illness or other students. Often this will occur naturally, such as sharing lecture notes with a classmate, but the SEd staff should also have other resources available to those SEd clients that are not able to access naturally occurring (e.g. NAMI, agency peer support program/groups, CRO). The SEd staff should offer to assist clients/encourage clients in finding peers that are positive influences and encourage clients in their educational paths.

**Method:** Interviews with clients, SEd staff, SEd supervisor, and case managers. Progress notes and treatment plan goals are also potential sources. Cross-reference interviews with clients, SEd staff, case management staff and the SEd supervisor for consistency.

17. **Ongoing Supports**

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<tr>
<td>24. Ongoing essential and supplemental supports are provided at least monthly to each SEd client. After preparing clients to attend an academic program (e.g. application for admission, financial aid, coarse schedule) it is part of the SEd staffs’ job to follow the progress of each SEd client to provide support, encouragement and to address needs in advance (e.g. tutoring, accommodations).</td>
<td>Assistance is provided monthly to &lt;= 29% of program participants.</td>
<td>Assistance is provided monthly to 30-49% of program participants.</td>
<td>Assistance is provided monthly to 50-69% of program participants.</td>
<td>Assistance is provided monthly to 70-89% of program participants.</td>
<td>Assistance is provided monthly to 90-100% of program participants.</td>
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**Definition and Rationale:** Ongoing supports include monitoring client progress with school, including assessing for accommodations, tutoring, transportation, etc. This would include assessing if financial aid is in place for the upcoming academic unit. Although much of the work for SEd is upfront, prior to the academic schedule beginning, another important part of the SEd staffs’ job is to follow the clients’ academic progress and foresee and address obstacles to academic success. Monthly support is defined as contact with a client at least monthly and this can be to complete at task, to discuss progress etc. The primary focus of the contact is to determine how academic progress is going, it is preferable that the contact be face to face, but in some cases only phone contact will be adequate.

**Item Rating:** This item will require that the fidelity raters consider each SEd staff’s performance regarding ongoing supports and then arrive at some kind of average for the team. If it is clear from the data gathered that some of the staff members provide 90 – 100%, while others only provide 50-69%, use an average for the entire SEd staff to rate this item.
**Supported Education Toolkit 3.0**

**Methods:** Progress notes, treatment plans, etc. should be the primary resource for assessing this item. If a problem arises that threatens the continuation of a client’s course of study, the raters should look back in the medical record to see if there is any documentation that the problem was addressed. Interviews with clients should also provide some insight into how to rate this item. In addition interviews with SEd staff should include a request for examples of how the SEd staff follow the clients on their caseload once the academic session begins.

### 25. Financial Assistance

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<tr>
<td>18.</td>
<td>Only 1 out of 5 financial aid types of assistance are delivered.</td>
<td>2 out of 5 financial aid types of assistance are delivered.</td>
<td>3 out of 5 financial aid types of assistance are delivered.</td>
<td>4 out of 5 financial aid types of assistance are delivered.</td>
<td>5 out of 5 financial aid types of assistance are delivered.</td>
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</table>

**Definition and Rationale:** SEd staff should offer assistance with locating sources for financial assistance (e.g. grants, loans, scholarships) and applying for financial assistance. This should be done during or before the application process, but also on an ongoing basis. The SEd staff should be aware of deadlines for applying for financial assistance from various sources.

**Item Rating:** The majority of clients will likely need some assistance with this item. In fact, this aspect of SEd, along with admission to an educational institution, might be the primary reasons why clients seek assistance from the SEd program. Types of assistance provided for this item includes gathering financial information (e.g. bank records, income tax returns), past academic records, etc. Keep in mind that includes applying for financial aid (scholarships, grants, loans, VR, etc) or multiple forms of financial aid to cover the entire cost of schooling. The SEd staff should also make sure clients understand how much debt they will be responsible to repay and what the financial ramifications are if they do not complete the semester/quarter.

This item includes reconciling previous financial aid awards where the client dropped out of school and is now in default. This can involve a plethora of documentation and take a considerable amount of time.

**Method:** Interviews with clients, SEd staff, SEd supervisor, and case managers. Progress notes and treatment plan goals are also potential sources.
19. **Liaison Services**

| 26. If disclosure occurs and is based on client identified need and preference, the supported education worker(s) serve as a proactive liaison to educational programs in order to address participant and programmatic issues. Collaboration and communication with relevant campus personnel occurs on a consistent and regular basis.* |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
| Assistance is provided to <= 29% of program participants. | Assistance is provided to 30-49% of program participants. | Assistance is provided to 50-69% of program participants. | Assistance is provided to 70-89% of program participants. | Assistance is provided to 90-100% of program participants. |

**Definition and Rationale:** When the client has disclosed to the educational institution he or she is attending, the SEd can serve as a liaison to campus personnel. This should only occur when there is an explicit purpose and agreement between the client and the SEd staff. When appropriate, the SEd staff should make contact with school personnel on a routine basis.

**Item Rating:** The SEd worker should, in most circumstances, be involved in setting up and maintaining accommodations. Once accommodations are in place the SEd staff should become a liaison to the academic staff involved with the accommodations; checking in with the appropriate school personnel on a regular basis.

The percentages in the anchors for this item refer to a percentage of clients that have disclosed to the school. So if the SEd program serves 100 SEd clients and 30% of those clients disclose, the percentages would be for 30 clients. In that scenario, to earn a rating of 5, 27 to 30 clients would have to receive liaison services from the SEd staff.

**Method:** Interviews with clients, SEd staff, SEd supervisor, and case managers. Progress notes and treatment plan goals are also potential sources.

20. **Individualization**

| 20. Educational Support Workers provide support that is individualized by participant’s preferences and needs.* |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
| Assistance is provided to <= 29% of program participants. | Assistance is provided to 30-49% of program participants. | Assistance is provided to 50-69% of program participants. | Assistance is provided to 70-89% of program participants. | Assistance is provided to 90-100% of program participants. |
Definition and Rationale: SEd staff provides services that are tailored to each client’s circumstances, preferences and desires. There should be a unique plan for each client that addresses the client’s wants and needs.

Item Rating: Look at treatment plan goals across clients for goal repetition, which indicates a lack of individualization. Likewise, look at progress notes for repetitiveness.

Method: Interviews with clients, SEd staff, SEd supervisor, and case managers. Progress notes and treatment plan goals are also potential sources. Recovery Goal Worksheets would also be a good source for SCM programs.

21. Mobile/Immediate Supports

| 28. Mobile/immediate supports are available when the student requires it. A supported educational worker is able to respond when a participant needs immediate support (travel to educational institution). |
|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 |
| Assistance is provided to <= 29% of program participants. | Assistance is provided to 30-49% of program participants. | Assistance is provided to 50-69% of program participants. | Assistance is provided to 70-89% of program participants. | Assistance is provided to 90-100% of program participants. |

Definition and Rationale: SEd staff should be available to clients when difficult situations arise. The staff should be prepared to intervene at the time the client is experiencing the problem, not a day or two later. This item is trying to determine if the SEd team provides immediate support, regarding the client’s academic pursuit, at the academic institution, at the client’s home (e.g. helping a client arrive to class on time), at a community location (e.g. a mobile hotspot where the client is experiencing some kind of difficulty).

Item Rating: Rating for this item is fairly straightforward. Gathering the data through the methods listed should indicate the level of mobile support available. If there is more than one SEd staff and there is a difference in the amount of mobile support provided, use their caseload sizes to determine the rating. So if there are 2 SEd staff, each serving 20 SEd clients, and one of them provides mobile support readily but the other only provides minimal (or no) mobile support, the rating would be 3. This might be a difficult item to rate at times, because the need for mobile support isn’t frequent. If there is no information in the progress notes, rely on the interviews. If none of the clients interviewed have had the experience of needing/asking of mobile supports then ask if they believe their SEd staff person would provide mobile/immediate support. Some types of immediate supports include: phone calls, travel to the institution, emails/texts, travel other locations (e.g. clients home, library, mobile hotspot). One example might be helping someone get out of his or her home to the bus stop, helping a client with accessing technology (e.g. online classes), etc.

Method: Interviews/focus group with clients, interviews with SEd staff, interview with SEd supervisor and progress notes. Have the SEd staff give specific examples of mobile/immediate supports that were provided during the current review period.
SECTION 2:
Tools for Fidelity Reviewers
OVERVIEW

The following tools and forms are meant to assist fidelity reviewers in their assessment of supported education implementation sites. These forms are not meant to be prescriptive, but rather provide examples of the types of forms assessors can develop to assist in conducting the review. The following tools are provided here: 1) Cover Sheet 2) Chart Review Tool, Interview Guide, and a Sample Fidelity Review Report.
COVER SHEET – SUPPORTED EDUCATION FIDELITY REVIEW

Date:___________________  Rater:____________________________________________

Program Name & Address:_________________________________________________

# of Supported Education consumers served in the last SIX months____________

# of Supported Education Specialists_________   Date Program started:___________

Sources:
  o Supported Education Roster
  o Chart review
     ___Agency medical charts     ___Treatment Plan
     ___Treatment Plan Reviews   ___Referral Tool
     ___Progress Notes            ___Educational Assessment
     ___Educational Goal Plan

___Program Coordinator Interviewed   (#)   _________
___Clinicians Interviewed   (#)   _________
___Supported Education Specialist Interviewed   (#)  _________
___Consumer Interviewed   (#)   _________
### CHART REVIEW TOOL: SUPPORTED EDUCATION FIDELITY REVIEW

**Instructions:**

This tool is to help fidelity reviewers’ speed up chart reviews. Before using chart review tool, familiarize yourself with the items being assessed in the fidelity scale first. Use check marks to indicate the presence of an identified element. Use comments box’s for comments. The first column provides hints about where in the overall chart you might find these elements.

**Key:**

- PN – Progress notes
- TxP – Treatment plan/goal plan
- SA – Strengths Assessment
- EA – Educational Assessment document
- D – Disclosure form
- Med Record – information might be found in various places in the medical record/client chart.
<table>
<thead>
<tr>
<th>Location</th>
<th>Fidelity Item</th>
<th>Case File 1</th>
<th>Comments</th>
<th>Case File 2</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>PN</td>
<td>Integration with Mental Health Treatment</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PN</td>
<td>Broad Range of Services</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>PN, TxP</td>
<td>Evidence of Screening?</td>
<td>7</td>
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<td>1st Contact Within 1 Week of Referral</td>
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<td>1 Concrete Activity Within 1 Month of Referral</td>
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<td>Contacted primary team about non-engagement</td>
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<td>Accommodations/Support Needs</td>
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The following questions are meant to help guide the interviews conducted during the fidelity visit. The questions provided here are examples only, do not have to be asked as written, and should not be asked in a rote manner. Instead these types of questions should be asked in a conversational manner while interviewing supported education participants, workers and leaders. Not all of these questions need to be asked, this guide simply provides a menu of options. Each fidelity scale item is provided here followed by some example questions.

1. **Provides All Phases:** The person providing supported education services provides all phases of the supported education process (referral, engagement, assessment, enrollment support, and ongoing educational support).

   **Example Interview Questions:**
   - Program Coordinator & Supported Education Specialist/Worker:
     Do you work with the same clients throughout their educational tenure or do different educational specialists work on different aspects of the process (e.g. intake, enrollment, financial aid etc.)? If a participant is assigned to a new educational specialist, what are the reasons for doing so?
   - Program Participants:
     Which supported education worker have you worked with since enrolling in the program? Have you felt like you have been passed around from worker to worker since joining? If your primary educational specialist was changed, why were they changed? Did you request the change or was it for some other reason?

2A. **Integration with Mental Health Treatment:** The Supported Education team is integrated with mental health treatment as illustrated by: (1) attending at least one case management team meeting per month, (2) attending all CM team meetings quarterly, and (3) having at least three client-related contacts per week with CM’s.

   **Example Interview Questions:**
   - Program Coordinator & Supported Education Specialist/Worker:
     Does a representative from the supported education program attend the team meetings of other teams? Is so, how often? Who attends from the supported education program? How often do you attend case-management team meetings? How do you ensure that you are visiting all of the different case management teams? How often do you rotate through all of the case management teams? How often do you contact case managers in general? What do you discuss with case managers when you contact them? Describe the means by which staff from the supported education team and members of other teams...
communicate and collaborate with each other (email, phone, face-to-face, written). What means of communication seems to be
the most effective? Have there been barriers to effective communication and collaboration? If so, please give some examples.
How have these barriers been addressed? By who? Have they been resolved?

-Clinical Staff from Other Teams:
How often does a supported education specialist visit your team meetings? Do they contact you outside of the case
management team meetings? What do these contacts look like (phone, email etc.) and what do you discuss?

2B. Integration with Mental Health Treatment: The Supported Education team is integrated with mental health treatment as i
illustrated by: (1) attempting to recruit new clients at CM team meetings, and (2) coordinating services at CM team meetings
3) During individual CM contact, inquiring about possible new referrals from case managers’ caseloads.

Example Interview Questions:
-Program Coordinator & Supported Education Specialist/Worker:
When a supported education representative attends a case management meeting what do they discuss? What do they bring
up? (probe for additional topics if they are not all three elements are present). Please give a case example of the joint
development of intervention plans involving the supported education worker/specialist and a provider from another team. Are
there barriers to the joint development of interventions? If so, how are those barriers addressed? By who? Can you give an
example?

-Clinical Staff from Other Teams:
When a supported education representative attends a case management meeting what do they discuss? What do they bring
up? (probe for additional topics if they are not all three elements are present). How many clients do you refer to the Supported
Education Program every month? How many clients do you have on your caseload? Do you know how many clients your team
refers to the Supported Education Program? Does the agency encourage teams to use the Supported Education Program? How?
Please give a case example of the joint development of intervention plans involving yourself and the supported education
worker/specialist. Are there barriers to the joint development of interventions? If so, how are those barriers addressed? By
who? Can you give an example?

3, Educational Outcomes: The Supported Education team: (1) tracks outcomes including: (a) % in education (b) % completed (c)
GPA (d) withdrawals/terminations, (e) # of credits, and (f) type of degree program. (2) the outcomes tracked and shared on a
semi-annual basis at a minimum (3) the outcomes tracked are shared with stakeholders (including clients and community
members) (4) the outcomes tracked are shared with staff (5) the outcomes tracked include both individual and aggregate
data.
Example Interview Questions:
- Program Coordinator & Supported Education Specialist/Worker:
  Who are educational outcomes shared with? How often are they shared? How are they shared? How are educational successes recognized (certificates, formal ceremonies, hand written congratulatory notes, displays)? Please give specific examples. How often do recognitions take place? Who are these recognitions shared with (others in the department, other agency staff, Board of Directors, other community agencies)?

- Clinical Staff from Other Teams:
  Are you made aware of educational outcomes in the Supported Education Program? How are these outcomes shared with you (announcements at meetings, newsletters, emails)? How often? Are educational successes recognized by the Supported Education Program? How are they recognized (see above)? How often? How are you made aware of the recognitions (invitations to ceremonies, announcements at meetings, newsletters, emails)?

- Program Participant:
  Have you received recognition of your educational successes? How were you recognized (see above)? How often? Do others receive recognitions as well? Who in the agency and community knows about the recognition that you have received? How did they find out?

4A. Caseload Size: Supported Education workers have a total caseload of 25 or less for an integrated model (combined supported employment and supported education caseload). —OR—

4B. Caseload Size: For the freestanding (nonintegrated) model: Supported Education workers have a total caseload of 35 or less.

Example Interview Questions:
- Program Coordinator:
  How many staff members on the team provide supported education services? How many people does each of these staff carry on their caseload? What percentage of time is this person (or persons) allotted for providing supported education services?

- Supported Education Specialist/Worker:
  How many people do you have on your caseload? What percentage of your time is allotted for providing supported education services?

5. Supervisor’s Duties: Supported Education supervisor ensures program objectives are met by: (1) Providing weekly supervision, (2) communicating with mental health service supervisors quarterly to resolve programmatic issues and to encourage referrals to the SEd program, (3) provides field mentoring every quarter, (4) provides individualized feedback regarding outcomes, and (5) helps develop new strategies and ideas to help clients achieve their educational goals.
Example Interview Questions:
- Program Coordinator:
  What do you see as your duties as a supervisor of the SEd team? What types of services do you provide your team? What does your field mentoring look like and how often does it occur? How do you ensure referrals come to the supported education program? How often does supervision occur? How do you coach supported education workers?
- Supported Education Specialist/Worker:
  What does your supported education program manager do? Do you receive weekly supervision? Do you receive field mentoring? What type of supervision and coaching do they provide you? Please provide an example of what your supervision or field mentoring interactions typically look like. How does your supervisor address programmatic issues or resolve problems regarding individual participants?

6. Range of Services: The Supported Education program offers services individualized for the specific educational needs of each consumer meant to further career development (e.g. GED/HS diploma, post-secondary education, vocational school, English as a Second Language, basic educational skills, online programs, apprenticeships, etc).

Example Interview Questions:
- Program Coordinator:
  What types of educational pursuits or degrees do you allow? What types of educational pursuits do you not allow? Please provide an example of an educational goal that was outside of the “norm” that you helped someone achieve.
- Supported Education Specialist/Worker:
  What types of educational pursuits or degrees do you allow? What types of educational pursuits do you not allow? Please provide an example of an educational goal that was outside of the “norm” that you helped someone achieve.
- Program Participant:
  Have you been told that the educational goals you are trying to achieve are not supported by the supported education program? Have you been forced to change your major or change your goals to something other than what your originally wanted? What types of educational goals have you wanted to pursue that were supported?

7. Screening: Consumers are not screened out of Supported Education Services based on formal or informal educational or non-educational eligibility requirements such as literacy, substance use, language barriers, symptoms, perceived readiness, motivation, age, hygiene, medication compliance, etc.
Example Interview Questions:

**-Program Coordinator & Supported Education Specialist/Worker:**
What are the eligibility criteria for participation in the Supported Education Program? How are decisions regarding acceptance into the program made (i.e. a team discussion, alone by the program coordinator, a meeting between the program coordinator and the specialist who will be assigned the referral)? Are all clients who are interested in the Supported Education Program encouraged to apply? How so? What is the process if a consumer desires to be in the program, but the staff member from another team does not carry out the referral? How is this decision mediated? Has anyone been refused admission to the program? If so, why (have them describe the situation).

**-Program Participant:**
When you applied (or were referred) to the Supported Education Program were you informed of any eligibility requirements? If so, can you list those requirements? Have you received encouragement from staff that you work with (Supported Education and staff from other teams) to participate in the Supported Education Program? Have you ever had staff discourage you from participation? If so, what happened?

**-Clinical Staff from Other Teams:**
Are you aware of the eligibility requirements for participation in the Supported Education Program? What are they? Have you ever had a referral refused for the Supported Education Program? Why? Are there circumstances in which an interested client would not be referred to the Supported Education Program? If so, please give examples.

8. **Engaging Communication With All Clients:** Case-managers and supported education workers regularly and frequently talk with all clients about education as an option (e.g. ask clients if they ever thought about it, convey education as a possibility, discuss pro’s and con’s, ask clients about their past experience with education, discuss connections between employment and educational goals, and discuss what their future educational goals might be if they were to pursue it)*

Example Interview Questions:

**-Supported Education Specialist/Worker:**
What do conversations about supported education look like with consumers? How are participants made aware of the specific services available in the Supported Education Program (informed verbally once or on several occasions, given written information)? How do you determine that they have an adequate knowledge of the services (do they ask questions, is the information discussed)?  Is supported education discussed as on option with ALL clients? What types of systematic ways does your agency ensure that these types of conversations occur?

**-Program Participants and Non Program Participants:**
Was the supported education program discussed with you? How did you first become aware that the supported education program was an option for you? What did those conversations look like? What are some of the supported education services
offered? Describe these services. What services have you used? Have you been given written materials about the available services? Was that information discussed with you?

- **Clinical Staff from Other Teams:**
  What do conversations about supported education look like with consumers? How are participants made aware of the specific services available in the Supported Education Program (informed verbally once or on several occasions, given written information)? How do you determine that they have an adequate knowledge of the services (do they ask questions, is the information discussed)? Is supported education discussed as an option with ALL clients? What types of systematic ways does your agency ensure that these types of conversations occur?

9.  **SEd Program Awareness:** Individuals who receive agency services are aware of the educational services provided as evidenced by displays of SEd program materials (posters, brochures, flyers) that are highly visible and are present in multiple locations that consumers frequent.

   **Example Interview Questions:**
   - **Program Coordinator & Supported Education Specialist/Worker:**
     What means are used to make clients aware of the Supported Education Program? Who is responsible for ensuring that materials are available in all areas frequented by clients? What materials are available for consumers to learn about the supported education program? Where are they located?
   - **Program Participant: How did you find out about the Supported Education Program?**
     Have you seen materials about the Supported Education Program around the agency? Where were the materials located? Do other clients know about the Supported Education Program? When did you become aware of the specific services available in the Supported Education Program? Do you think clients outside of the Supported Education Program are aware of specific services? Why or why not?
   - **Clinical Staff from Other Teams:**
     How did you become aware of the Supported Education Program? Have you seen materials (brochures, flyers) about the Supported Education Program in client areas?

10A.  **Services Begin Quickly:** Individuals seeking supported education services receive their first contact by the supported education team within one week of referral.

10B.  **Services Begin Quickly:** Individuals seeking supported education services have one concrete educational activity completed within one month of referral.
 Supported Education Toolkit 3.0

Example Interview Questions:
- Program Coordinator & Supported Education Specialist/Worker:
  Please describe the referral and intake process. How soon after referral does the intake process usually take place? What is the first activity that you normally do with a client. When does this first activity normally take place?
- Program Participant:
  After you were referred to the Supported Education Program, how long did it take for you to start your intake? How long to complete your intake? What was the first thing the supported education worker did with you? What was the first thing the supported education worker helped you to do?
- Clinical Staff from Other Teams:
  When you have referred a client to the Supported Education Program how long has it taken to get an intake? What is the first activity that the supported education does with your clients and when does it usually take place?

11, Assertive engagement and outreach: (phone, mail, email, community visits) occurs with new referrals or when a participant stops participating in SEd services until the individual acknowledges they do not want to continue SEd services or re-engage. The following elements should be in place: 1) a systematic means of tracking outreach efforts 2) SEd workers make a minimum of five outreach attempts within one month 3) Has contacted the primary treatment team about the non-engagement.

Example Interview Questions:
- Program Coordinator & Supported Education Specialist/Worker:
  What systematic means does the supported education program to ensure that assertive engagement occurs and continues if needed? How often do assertive outreach attempts occur when they are needed? Besides the participant, who else do you contact if the person needs to be re-engaged in the program?
- Program Participant:
  Do you find that the supported education staff contact you often to see how you are doing? Have you ever felt like isolating and had the supported education worker check to make sure you are okay? If you miss a meeting with the supported education worker what happens?
- Clinical Staff from Other Teams:
  What systematic means does the supported education program have to ensure that assertive engagement occurs and continues if needed? How often do they contact someone if they start to disengage from the supported education program? Do the supported education workers contact you if one of your clients starts to disengage from the program?
12. **Written Assessment:** Educational Support Workers assess participants’ (1) educational interests, (2) talents, skills, environmental supports, resources (3) preferences, (4) academic history, (5) future academic aspirations, (6) barriers to education, and (7) accommodations/support needs and documents their assessment using an educational assessment tool. The educational assessment is updated quarterly with new information based on changes in the participants’ life situation.

**Example Interview Questions:**
- **Program Coordinator & Supported Education Specialist/Worker:**
  What is assessed in the educational assessment tool when someone first becomes involved in the program? Is this information ever updated? (probe for any missing information).
- **Program Participant:**
  When you first signed up for the program what types of questions did the supported education worker ask you?

13. **Disclosure:** Educational support workers assist participants in making an informed decision regarding disclosure to school staff, faculty and students. An informed decision includes the following: (1) disclosure is not required (2) offer to discuss pro’s and con’s including how the decision influences access to accommodations (3) discuss what/how information may be appropriately disclosed including examples (4) workers discuss disclosure and revisit it at least quarterly.

**Example Interview Questions:**
- **Program Coordinator & Supported Education Specialist/Worker:**
  What systematic means does the supported education program have to ensure that conversations about disclosure to educational institutions occur? What do these conversations about disclosure look like? What happens if a participant decides not to disclose? What happens if they decide to disclose? How often do you revisit the topic of disclosure with a participant?
- **Program Participant:**
  Has the supported education worker ever talked with you about the pro’s and con’s about disclosing your mental illness with your educational institution? If so, what did this conversation look like? IF these conversations have happened how often would you say they occur? Or have they happened more than once?

14. **Educational Goal Planning:** Educational Support Workers provide individualized educational goal planning that is updated quarterly and meet these criteria: (1) consumer preferences; (2) includes long-term goal(s), (3) short-term action steps, (4) date(s) for completion, and (5) responsibilities.
**Example Interview Questions:**

- **Program Coordinator & Supported Education Specialist/Worker:**
  How often does educational goal planning occur? How often are they updated? What is included in educational goal planning?

- **Program Participant:**
  How often does the supported education work talk with you about your long term educational goals? Your short term educational goals? Do they ever fill out a form to track your goals with you? What types of things do they track?

15. **Essential Enrollment/Ongoing Supports:** At a minimum, the following services are provided for individuals beginning enrollment or continuing enrollment at an educational institution. 1) application for admission 2) financial aid 3) books and supplies 4) transportation 5) class scheduling

**Example Interview Questions**

- **Program Coordinator & Supported Education Specialist/Worker:**
  Are on-going supports for securing financial aid available to participants? If so, please give describe the assistance that is given. Does the office of student financial aid at the institution continue to be used in the process? Is assistance with the application process available to participants? If so, please describe how assistance is provided. Is assistance with securing academic supplies and required text books available to participants? If so, please describe the assistance that is given. Is assistance with setting a course schedule available? Is so, please describe the assistance. How are the degree requirements determined for the participant’s course of study? How is the academic advising office at the school utilized in the process of setting a schedule and determining degree requirements? Is assistance with transportation available? If so, please describe what assistance is given.

- **Program Participant:**
  Is on-going assistance with securing financial aid available to you? Do you continue to get help from the financial aid office at the school? If so, how did they assist you? If the participant has not used this service inquire about why the service not been used. Is assistance with application to the school available to you? Have you used this service? If so, please describe how you were assisted. If not, why not? Is assistance with securing academic supplies and required text books available to you? Have you used this service? If so, please describe how you were assisted. If not, why not? Is assistance with setting your schedule and determining degree requirements available to you? Did you get help from the advising office at the school? If so, how did they assist you? If the participant has not used this service inquire about why the service not been used. Is assistance with transportation to the educational institution available to you? If the participant has not used this service inquire about why the service not been used.
16. **Supplemental Enrollment/ Ongoing Supports:** At a minimum, the following services are provided for individuals beginning enrollment or continuing enrollment at an educational institution. 1) familiarization with educational institution 2) introduction to campus resources and personnel 3) tutoring 4) accommodations 5) peer support

**Example Interview Questions:**

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**-Program Coordinator & Supported Education Specialist/Worker:**

Are on-campus exposure activities made available to participants? Please give specific examples of these activities. Is the supported education worker/specialist available to introduce the participant to useful campus personnel? Is this service offered to each participant? Are peer role models/mentors available to participants on both a structured and unstructured basis? Please give examples of availability on a structured basis (support groups, formal assignment of a peer role model/mentor to a participant, scheduled time periods that peer role models/mentors are available). Please give examples of availability on an unstructured basis (peer role models/mentors that have been observed supporting a participant, participant report of seeking and gaining support from a peer role model/mentor on their own). Are participants aware of the availability of peer role models/mentors? If so, by what means are they made aware? Please describe the peer supports that are available to participants. How are each of these utilized by participants? What role do the participants play in the leadership of the peer supports offered by the supported education program? Are tutoring services available to participants? If so, who delivers these services? Are tutoring services offered at the school? If so, are participants encouraged to use tutoring services at the school? If not, why not? Is the participant made aware of the accommodations available under the ADA? How are participants made aware of accommodations? Are participants assisted in obtaining accommodations? Please describe the assistance.

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**-Program Participant:**

Are on-campus exposure activities available to you? Have you requested this service? If yes, what on-campus exposure activities did you request? If no, why not? Are you aware of opportunities to attend events on campus? Are they regularly scheduled? Please give some examples of these events (see above). How do you come to know about these events? Do you attend? Why or why not? Has the supported education worker/specialist offered to introduce you to useful campus personnel? Did you use this service? Why or why not? If so, what campus personnel were you introduced to? Are there peer role models/mentors available to you? Please give some examples of how you have access to them. How did you become aware of the availability of peer role models/mentors? Do you use this service? Why or why not? What types of peer support opportunities do you have? Do you use them? Why or why not? Who leads peer supports offered in the supported education program? Are tutoring services available to you? If so, who provides these services (SED program, school, other community agency)? Do you use tutoring services at the school? If not, why not? If not, does your supported education worker/specialist encourage you to use the tutoring services at the school? Are you familiar with academic accommodations available through the ADA? If so, what are some of them? Do you use any of these accommodations? If so, how were they initiated?
17. **Ongoing Supports:** Ongoing essential and supplemental supports are provided at least monthly to each SEd client. After preparing clients to attend an academic program (e.g. application for admission, financial aid, course schedule) it is part of the SEd staffs’ job to follow the progress of each SEd client to provide support, encouragement and to address needs in advance (e.g. tutoring, accommodations).

**Example Interview Questions:**
- **Program Coordinator & Supported Education Specialist/Worker:**
  Once participants are successfully attending classes how do you proactively ensure that they continue to experience success?  How often do you contact them?  What other things do you do?
- **Program Participant:**
  If you have been attending classes for a while how often does the supported education worker contact you?  How do they continue to help you succeed?

18. **Financial Assistance:** Educational support workers provide assistance in securing financial aid/assistance (i.e. scholarships, grants, VR access etc.) during enrollment and throughout educational tenure. The assistance is comprehensive and should cover the following elements: 1) gathering relevant financial/academic information (e.g. bank records, income tax returns, past academic records), 2) resolving past educational loan defaults, 3) exploration of grant/scholarship opportunities 4) exploration of funding opportunities (e.g. special programs, VR, etc) and 5) their potential ramifications.

**Example Interview Questions:**
- **Program Coordinator & Supported Education Specialist/Worker:**
  Are supports for securing financial aid available to participants?  If so, please give describe the assistance that is given.  How is the office of student financial aid at the institution used in the process?  What types of financial aid programs are discussed?  How are passed financial problems resolved?  (probe for missing information).
- **Program Participant:**
  Is assistance in securing financial aid available to you?  Have you used this service?  If so, please describe how you were assisted.  Did you get help from the financial aid office at the school?  If so, how did they assist you?  If you had past financial aid problems how did the supported education worker assist you in resolving these issues?  Did they help you gather your financial records to help you apply for financial aid?

19. **Liaison Services:** If disclosure occurs and is based on client identified need and preference, the supported education worker(s) serve as a proactive liaison to educational programs in order to address participant and programmatic issues. Collaboration and communication with relevant campus personnel occurs on a consistent and regular basis.
Example Interview Questions

-Program Coordinator:
Describe the types of activities that Supported Education Specialists do in their role as liaison to institutions (i.e. communicate concerns of the institution to the program coordinator, develop and maintain relationships with relevant staff and faculty at the institution, seek reasonable resolution of student issues with staff and of institution)? Are supported education workers/specialists available to act as a mediator on behalf of the participant with the school or other agencies? If so, please give some examples of the circumstances in which this service has been used. Is the participant present during the mediation process? If not, why not?

-Supported Education Specialist/Worker:
Describe the types of activities that you do in your role as liaison to institutions (see above)? Are supported education workers/specialists available to act as a mediator on behalf of the participant with the school or other agencies? If so, please give some examples of the circumstances in which this service has been used. Is the participant present during the mediation process? If not, why not? What steps are taken to build the skills and confidence necessary for the participant to act on his/her own behalf?

-Program Participant:
Has the supported education worker ever helped you solve problems at the education institution? How did they go about doing this? Is the supported education worker/specialist available to act as a mediator on your behalf with the school or other agencies? Have you used this service? If so, please describe the circumstances in which this service was provided for you? Were you present when this service was provided? If not, why not? Has the supported education worker/specialist taught you about the skills necessary to mediate problems? If so, what are some of those skills?

20. Individualization: Educational Support Workers provide support that is individualized by participant’s preferences and needs.

Example Interview Questions:

-Program Coordinator & Supported Education Specialist/Worker:
Are services provided by the supported education program individualized to meet participants educational preferences and needs? If so how? Please provide some examples.

-Program Participant:
Have you ever been told that your educational preferences or needs could not be accommodated? If so why? How are your individual preferences included in the program? If you have educational needs, how are they accommodated?
21. **Mobile/immediate supports:** are available when the student requires it. A supported educational worker is able to respond when a participant needs immediate support (travel to educational institution).

**Example Interview Questions:**

- **Program Coordinator & Supported Education Specialist/Worker:**
  Are mobile support services available to participants? If so, please describe how these services are delivered (when, where, how workers are contacted, how quickly they are able to respond). Is the supported education worker/specialist available to accompany the participant to the school? If so, please give examples of the circumstances in which the participant has requested accompaniment.

- **Program Participant:**
  Is the supported education worker/specialist available to accompany you to the school? Have you used this service? If so, what supports were you given? If the participant has not used the service inquire about why the service has not been used. Are mobile support services available to you? Have you used this service? If so, please describe your experience (what were the circumstance of the need, how you contacted the worker, where you received the service, how long the response time was). Was the service helpful? Why or why not?
Purpose

This report describes the Supported Education (SEd) program at __________ Community Mental Health center in ______________, ________ for the baseline report of participation as a pilot program of Supported Education.

Method

The fidelity review took place on _______________. Data for the fidelity assessment was gathered through interview and record review. Interviews were conducted with ________ of the SEd workers, the Program Manager, ______ Case Managers, ______ Clinicians, and _____ participants in the SEd Program. The case-file review consisted of ten randomly selected consumer records.

Substantial Strengths of the Supported Education Program

- The program was able to achieve a fidelity score of 3.94 despite never having a previous review and having never received extensive consultation or technical assistance for implementing supported education (apart from supported employment).
- The program does a very good job with assertive engagement and has well documented assertive engagement services.
- The consumers interviewed reported high quality services being delivered by the team staff.
**Recommendations for the Supported Education Program**

A score of 3.94 is very good for a baseline review. The following are the primary recommendations based on the in-depth review:

- The areas where the team scored lower primarily had to do with documentation of educational services. This is not surprising as this team was developed initially to be a supported employment team and supported education was added as a service later. Ensuring that education specific services and outcomes are consistently tracked will greatly increase many of the items where the team scored low. If desired, example forms are available from the reviewers which can be modified to meet this team’s unique needs and can ensure that education specific outcomes and services are tracked. However, these forms are examples and not a requirement. The team could develop their own tracking mechanisms if they prefer.

- Consistent with the previous recommendation, development of education specific brochures and other recruitment media will ensure that the word gets out that the team provides more than employment services, but educational services as well. To be a truly integrated team providing both supported employment and education services, educational services need to be formally integrated into flyers and other recruitment media, not just available through word-of-mouth.

- Ensuring that adequate education related conversations about disclosure occurs will be important. Some of the consumers interviewed indicated that they had great conversations about whether or not to disclose to potential employers, but that it was just assumed that they would want to disclose to the educational institution in order to obtain accommodations. The disclosure conversation to educational institutions should include both the pros and cons of disclosing and the pros and cons of not disclosing to educational institutions, students, teachers, and others using a shared-decision making process and format.

Overall this team did exceptionally well for a baseline review and for a self-instigated implementation effort. Any recommendations we provide should not detract from the sense of accomplishment this team should feel.
## Summary of Scores

<table>
<thead>
<tr>
<th>Item Category</th>
<th>Overall Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing and Organizational Factors</td>
<td>4.57</td>
</tr>
<tr>
<td>Referral and Engagement</td>
<td>4</td>
</tr>
<tr>
<td>Assessment and Goal Planning</td>
<td>2.33</td>
</tr>
<tr>
<td>Enrollment/Ongoing Supports</td>
<td>5</td>
</tr>
<tr>
<td><strong>OVERALL SCORE</strong></td>
<td><strong>3.94</strong></td>
</tr>
</tbody>
</table>
## Staffing and Organizational Factors

<table>
<thead>
<tr>
<th>Item</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The person providing supported education services provides all phases of the supported education process (referral, engagement, assessment, enrollment support, and ongoing educational support).</td>
<td>5</td>
</tr>
<tr>
<td>Program participants receive services from the same worker throughout their educational tenure.</td>
<td></td>
</tr>
<tr>
<td>2A. The Supported Education team is integrated with mental health treatment as illustrated by: (1) attending at least one case-management team meeting per month, (2) attending all CM team meetings quarterly, and (3) having at least three client-related contacts per week with CM’s.</td>
<td>5</td>
</tr>
<tr>
<td>The workers meet with each case-management team weekly and contact CM usually about 10 times per week.</td>
<td></td>
</tr>
<tr>
<td>2B. The Supported Education team is integrated with mental health treatment as illustrated by: (1) attempting to recruit new clients at CM team meetings, and (2) coordinating services at CM team meetings. (3) During individual CM contact, inquiring about possible new referrals from case managers’ caseloads.</td>
<td>5</td>
</tr>
<tr>
<td>The team is integrated with the mental health team and attempt to meet all three of the team meeting criteria.</td>
<td></td>
</tr>
<tr>
<td>3. The Supported Education team: (1) tracks outcomes including: (a) % in education (b) % completed (c) GPA (d) withdrawals/terminations, (e) # of credits, and (f) type of degree program. (2) the outcomes tracked and shared on a semi-annual basis at a minimum (3) the outcomes tracked are shared with stakeholders (including clients and community members) (4) the outcomes tracked are shared with staff (5) the outcomes tracked include both individual and aggregate data.</td>
<td>4</td>
</tr>
<tr>
<td>While many of these outcomes are tracked they are not shared regularly with stakeholders.</td>
<td></td>
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</tbody>
</table>
4. Supported Education workers have a total caseload of 25 or less for an integrated model (combined supported employment and supported education caseload).

<table>
<thead>
<tr>
<th>Task</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>For integrated teams this team has a slightly higher caseload than is suggested by the fidelity scale (25 or less). The team has approximately 30 individuals per case-manager.</td>
<td>4</td>
</tr>
</tbody>
</table>

5. Supported Education supervisor ensures program objectives are met by: (1) Providing weekly supervision, (2) communicating with mental health service supervisors quarterly to resolve programmatic issues and to encourage referrals to the SEd program, (3) provides field mentoring every quarter, (4) provides individualized feedback regarding outcomes, and (5) helps develop new strategies and ideas to help clients achieve their educational goals.

<table>
<thead>
<tr>
<th>Task</th>
<th>Rating</th>
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</thead>
<tbody>
<tr>
<td>The supported education supervisor provides 4 out of 5 of the services. Field mentoring specific to educational services should increase.</td>
<td>4</td>
</tr>
</tbody>
</table>

6. The Supported Education program offers services individualized for the specific educational needs of each consumer meant to further career development (e.g. GED/HS diploma, post-secondary education, vocational school, English as a Second Language, basic educational skills, online programs, apprenticeships, etc).

<table>
<thead>
<tr>
<th>Task</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>The team provides these individualized services.</td>
<td>5</td>
</tr>
</tbody>
</table>

**Overall Rating**

<table>
<thead>
<tr>
<th>Overall Rating</th>
<th>4.57</th>
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</table>

The team scored very well for staffing and organizational features! Especially for a baseline review. Excellent work. Some small adjustments in outcome reporting and other services will make this score even higher.
## Referral and Engagement

<table>
<thead>
<tr>
<th>Item</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Consumers are not screened out of Supported Education Services based on formal or informal educational or non-educational eligibility requirements such as literacy, substance use, language barriers, symptoms, perceived readiness, motivation, age, hygiene, medication compliance, etc.</td>
<td>5</td>
</tr>
<tr>
<td>It appears that consumers are not screened out of SEd services based on formal or informal criteria. Consumers with barriers to employment are provided services and coached for success.</td>
<td></td>
</tr>
<tr>
<td>5. Case-managers and supported education workers regularly and frequently talk with all CSS clients about education as an option (e.g. ask clients if they ever thought about it, convey education as a possibility, discuss pro’s and con’s, ask clients about their past experience with education, discuss connections between employment and educational goals, and discuss what their future educational goals might be if they were to pursue it)*</td>
<td>5</td>
</tr>
<tr>
<td>There are structures in place to ensure that conversations take place between case-managers and participants about education. There is some indication that the quality of these conversations might improve, but not strong enough evidence to reduce the score on this item.</td>
<td></td>
</tr>
<tr>
<td>6. Individuals who receive agency services are aware of the educational services provided as evidenced by displays of SEd program materials (posters, brochures, flyers) that are highly visible and are present in multiple locations that consumers frequent.</td>
<td>1</td>
</tr>
<tr>
<td>While there are high quality materials for the supported employment services provided by the team, brochures and other media for educational services have not yet been developed.</td>
<td></td>
</tr>
<tr>
<td>7. A. Individuals seeking supported education services receive their first contact by the supported education team within one week of referral.</td>
<td>3</td>
</tr>
<tr>
<td>According to staff interviews and case-file review 60-74% of cases have a visit the first week.</td>
<td></td>
</tr>
<tr>
<td>10. B. Individuals seeking supported education services have one concrete educational activity completed within one month of referral.</td>
<td>5</td>
</tr>
<tr>
<td>All participants have one concrete educational activity completed within one month of referral.</td>
<td></td>
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</tbody>
</table>
8. Assertive engagement and outreach (phone, mail, email, community visits) occurs with new referrals or when a participant stops participating in SEd services until the individual acknowledges they do not want to continue SEd services or re-engage. The following elements should be in place: 1) a systematic means of tracking outreach efforts 2) SEd workers make a minimum of five outreach attempts within one month 3) Has contacted the primary treatment team about the non-engagement.

According to case-file reviews (and corresponding staff interviews) assertive engagement is a strength of this team. Efforts to re-engage are well documented and consumers reported that outreach efforts are made if they start to isolate. WELL DONE!

<table>
<thead>
<tr>
<th>Overall Rating</th>
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<tbody>
<tr>
<td>4</td>
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</table>

This item is scored at a 4 which is still high for a baseline review. This team has a strength with assertive engagement. However, not having educational specific flyers and brochures as well as not meeting with all newly referred participants within one week lower the overall score. Developing and disseminating some educational specific marketing tools will rapidly increase this score.
### Assessment and Goal Planning

<table>
<thead>
<tr>
<th>Item</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Educational Support Workers assess participants’ (1) educational interests, (2) talents, skills, environmental supports, resources (3) preferences, (4) academic history, (5) future academic aspirations, (6) barriers to education, and (7) accommodations/support needs and documents their assessment using an educational assessment tool. The educational assessment is updated quarterly with new information based on changes in the participants’ life situation.</td>
<td>1</td>
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</tbody>
</table>

While documentation regarding employment outcomes is of high quality, documentation of specific educational activities is not consistent or is not present. More explicit documentation of educational assessment is needed. Example forms which help with initial educational assessment can be provided by the fidelity reviewers if desired.

10. Educational support workers assist participants in making an informed decision regarding disclosure to school staff, faculty and students. An informed decision includes the following: (1) disclosure is not required (2) offer to discuss pro’s and con’s including how the decision influences access to accommodations (3) discuss what/how information may be appropriately disclosed including examples (4) workers discuss disclosure and revisit it at least quarterly.

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>10. Educational support workers assist participants in making an informed decision regarding disclosure to school staff, faculty and students. An informed decision includes the following: (1) disclosure is not required (2) offer to discuss pro’s and con’s including how the decision influences access to accommodations (3) discuss what/how information may be appropriately disclosed including examples (4) workers discuss disclosure and revisit it at least quarterly.</td>
<td>2</td>
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</table>

While documentation of employment related disclosure is well documented, the concerns regarding disclosure to educational institutions is not documented. If you would like, the reviewers will adapt your current disclosure forms for you to reflect these additional educational concerns.

11. Educational Support Workers provide individualized educational goal planning that is updated quarterly and meet these criteria: (1) consumer preferences; (2) includes long-term goal(s), (3) short-term action steps, (4) date(s) for completion, and (5) responsibilities.

<table>
<thead>
<tr>
<th>Item</th>
<th>Rating</th>
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<tbody>
<tr>
<td>11. Educational Support Workers provide individualized educational goal planning that is updated quarterly and meet these criteria: (1) consumer preferences; (2) includes long-term goal(s), (3) short-term action steps, (4) date(s) for completion, and (5) responsibilities.</td>
<td>4</td>
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</tbody>
</table>

Four out of five of these criteria are updated quarterly. The person responsible for completing the goal(s) was not included in the update(s).

**Overall Rating** 2.33

**Recommendations:** Primary concerns in this section have to do with documentation. This can be addressed by the use of accurate and consistent tracking of educational outcomes. While periodically noted that forms are available from the reviewers that can help with this, these are supplemental forms and not a requirement. As long as the team tracks these outcomes in some form to ensure services are delivered the scores on these items will increase.
### Enrollment/Ongoing Supports

<table>
<thead>
<tr>
<th>Item</th>
<th>Rating</th>
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</thead>
<tbody>
<tr>
<td>1. <strong>(Essential Services)</strong> At a minimum, the following services are provided for individuals beginning enrollment or continuing enrollment at an educational institution. 1) application for admission 2) financial aid 3) books and supplies 4) transportation 5) class scheduling</td>
<td>3</td>
</tr>
<tr>
<td>While most of these services were documented periodically, they were not documented consistently. This item is scored a three because it was unclear via documentation whether educational specialists ensure that all of these services occur. If desired, quarterly update checklist forms are available from reviewers as a template for SEd programs ensure these services are delivered.</td>
<td></td>
</tr>
<tr>
<td>2. <strong>(Supplemental Services)</strong> At a minimum, the following services are provided for individuals beginning enrollment or continuing enrollment at an educational institution. 1) familiarization with educational institution 2) introduction to campus resources and personnel 3) tutoring 4) accommodations 5) peer support</td>
<td>2</td>
</tr>
<tr>
<td>While some of these services were documented periodically, they were not documented consistently. This item is scored a two because it was unclear via documentation whether educational specialists ensure that all of these services occur if they are needed/requested. If desired, quarterly update checklist forms are available from reviewers as a template for SEd programs ensure these services are delivered.</td>
<td></td>
</tr>
<tr>
<td>3. <strong>Ongoing essential and supplemental supports</strong> are provided at least monthly to each SEd client. After preparing clients to attend an academic program (e.g. application for admission, financial aid, course schedule) it is part of the SEd staffs’ job to follow the progress of each SEd client to provide support, encouragement and to address needs in advance (e.g. tutoring, accommodations).</td>
<td>4</td>
</tr>
<tr>
<td>Participants are contacted at least monthly. However, it is unclear whether SEd workers assess for, and ensure that, all of the essential ongoing and supplemental services are provided to participants if needed.</td>
<td></td>
</tr>
<tr>
<td>4. <strong>If disclosure occurs and is based on client identified need and preference,</strong> the supported education worker(s) serve as a proactive liaison to educational programs in order to address participant and programmatic issues. <strong>Collaboration and communication with relevant campus personnel occurs on a consistent and regular basis.</strong></td>
<td>5</td>
</tr>
<tr>
<td>According to interviews (both staff and participant) this service occurs for 100% of participants.</td>
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## Supported Education Toolkit 3.0

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<tbody>
<tr>
<td><strong>5. Educational Support Workers provide support that is individualized by participant’s preferences and needs.</strong></td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>All participants enrolled in the program receive individualized services.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6. Mobile/immediate supports are available when the student requires it. A supported educational worker is able to respond when a participant needs immediate support (travel to educational institution).</strong></td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Documentation provided examples when mobile support was available, staff indicated that they were available to provide such a service, and participants indicated that they often received mobile support services.</td>
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<td></td>
</tr>
<tr>
<td><strong>Overall Rating</strong></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>The team scored very well in this category in general. Especially given that this is the baseline review. Many of the issues throughout the review thus far have surrounded the concern about education specific service delivery and documentation. It is not surprising that other services are documented (especially employment services) as that is the primary goal for many of those who join the team. However, care consideration and documentation of essential and ongoing educational services being provided by the team will improve scores on these items as well.</td>
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## Five Year Total Fidelity Score Overview

<table>
<thead>
<tr>
<th>Fidelity Item Category</th>
<th>Base Line Rating</th>
<th>Six Month Rating</th>
<th>One Year Rating</th>
<th>18 month /2 yr Rating</th>
<th>Three Year Review</th>
<th>Four Year Review</th>
<th>Five Year Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staffing and Organizational Factors</td>
<td>4.57</td>
<td></td>
<td></td>
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<tr>
<td>Referral and Engagement</td>
<td>4</td>
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<tr>
<td>Assessment and Goal Planning</td>
<td>2.33</td>
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<tr>
<td>Enrollment/Ongoing Supports</td>
<td>4</td>
<td></td>
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<tr>
<td>Total Score</td>
<td>3.94</td>
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</table>
SECTION 3: Tools for Implementation Sites
The following tools and forms are meant to assist supported education implementation sites in their assessment and delivery of supported education services. These forms are not meant to be prescriptive, but rather provide examples of the types of forms sites can use for tracking and delivering services. The following tools are provided here: 1) Referral Form 2) Educational Assessment and Goal Planning Form, Disclosure form, and the Quarterly Update Checklist.
SUPPORTED EDUCATION REFERRAL FORM

Date: __________________     Name:________________________________      Address: ________________________________

Phone:  Home _________________    Cell: _______________    Email: ________________________

Best methods to reach you: ________________________________________________

What is the highest level of school you have completed? __________________________

Are you currently enrolled in school or a training program?  Yes___       No____

What is your educational goal?________________________________________________________________________

What types of services or supports do you think you would need to succeed in returning to or continuing in school?
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Other information you would like to share:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________

Case Manager: ________________________________    Therapist: ________________________________
Referred by: ________________________________
Educational Assessment for Supported Education

PRESENT SITUATION

Name: ______________________________________       Date: __________________          Address: ____________________________________________
Phone:  Home _________________  Cell: _____________ __         Email: ________________________

What are the main reasons you enrolled in the Supported Education program?

☐ Career/educational exploration
☐ Help with applying for Financial Aid
☐ Help with school enrollment
☐ Help with requesting academic accommodations
☐ Help with study skills
☐ Help with test taking strategies
☐ Help through tutoring
☐ Improving math skills
☐ Improving writing skills
☐ Interest in attending preparatory classes
☐ Gaining familiarity with college environment
☐ Other, please list
EDUCATIONAL HISTORY

What is the highest level of education completed:

- G.E.D. *Year___________ *School_________________
- High School diploma *Year___________ *School_________________
- Vocational School *Year___________ *School_________________
- Vocational certificate *Year___________ *School_________________
- College attendance *Number of college hours completed:___________
- Associates degree *Year___________ *School_________________
- Bachelors degree *Year___________ *School_________________
- Masters degree *Year___________ *School_________________
- Ph.D. or doctorate degree *Year___________ *School_________________

Other:
Interest inventories can be used to help spur educational ideas for participants. After filling out an interest inventory supported education workers and participants can converse and set educational goals which may be based on the interest inventory. There are many interest inventory assessments available of which the included is an optional example. Interest inventory assessments are organized in many different ways and serve a variety of purposes. Finding an inventory that meets the needs of your participants, agency, and region is important. An interest inventory should not be used to limit the educational pursuits of participants; instead they should be viewed as optional tools to help participants brainstorm ideas.

Examples of additional interest inventory assessments available online include:

The Career Clusters Interest Survey

The MAPP Career Assessment
http://www.assessment.com/MemberCenter/login.asp?GoTo=%2FMemberCenter%2FDefault%2Easp

The Live Career, Career Test
http://www.livecareer.com/career-test
### Educational Interest Inventory Tool

Please check the following areas that you have interest in learning more about.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>Ballroom dance</td>
<td>Cake decorating</td>
<td>Databases</td>
<td>E-Bay</td>
<td>First aid</td>
</tr>
<tr>
<td>Acting</td>
<td>Barn dancing</td>
<td>Calligraphy</td>
<td>Dental hygiene</td>
<td>Electronics</td>
<td>Flexibility conditioning</td>
</tr>
<tr>
<td>Acupressure</td>
<td>Basket weaving</td>
<td>Candle making</td>
<td>Dentistry</td>
<td>Electrical engineering</td>
<td>Floral entrepreneurship</td>
</tr>
<tr>
<td>Aerobic kickboxing</td>
<td>Basketball</td>
<td>Chemistry</td>
<td>Dental materials</td>
<td>Engineering</td>
<td>Flowerbed design</td>
</tr>
<tr>
<td>Aerobics</td>
<td>Beading</td>
<td>Chemistry in society</td>
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<td>Energy systems</td>
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</table>
1. Prioritize your top three areas of interest (using an interest inventory can help with this):

   #1
   #2
   #3

2. What is your educational goal?

3. Do you know the educational requirements for this goal?

4. If you are not enrolled, how soon would you like to begin classes?

5. What kind of resources do you think you will need to reach your educational goals? (e.g. transportation; support from family; computer access; tutor/mentor; help with college application; tuition; books/supplies, etc.)
6. What types of challenges/barriers have you faced in the past or think may happen in the future as you return to school? (e.g. “difficulty talking to instructors, medication side effects).

7. What might help in overcoming these barriers to education?

8. What time of day do you think it would be best for you to take a class?
BARRIERS TO EDUCATION CHECK SHEET

Using research from students and the literature, there appear to be several common themes that serve as barriers for individuals to return or sustain their educational involvement. This checklist provides a starting point to assess and strategize options for overcoming educational barriers.

____ Transportation (e.g. don’t have a car or don’t know how to use public transit)
   Strategy: ____________________________________________________________

____ Past failures and negative experiences (e.g. didn’t do well in school previously)
   Strategy: ____________________________________________________________

____ Side effects from medication (e.g. Medication makes it hard to concentrate)
   Strategy: ____________________________________________________________

____ Symptoms (e.g. Depression gets in the way, voices make it hard to listen in class)
   Strategy: ____________________________________________________________

____ Academic learning skills (e.g. Lack of computer skills or poor study skills)
   Strategy: ____________________________________________________________

____ Fears of the unknown (e.g. Fear of failure)
   Strategy: ____________________________________________________________

____ Lack of support (e.g. Not sure what to enroll in or how to get around campus)
   Strategy: ____________________________________________________________

____ Funding (e.g. Need money to go to school, need to work while attending school)
   Strategy: ____________________________________________________________
___**Need accommodations** (e.g. Note taker, longer test time, tutors)
Strategy: ____________________________________________________________

___**Physical Disability** (e.g. Difficult to get around campus or to sit through a class)
Strategy: ____________________________________________________________

___**Other commitments** (e.g. Work, family)
Strategy: ____________________________________________________________

___**Other:** (List any other barriers that may get in the way of reaching your educational goal)
Strategy: ____________________________________________________________
CURRENT RESOURCES AND NEEDED RESOURCES

FINANCIAL

○ Have you applied for financial aid?
  ➢ Type/amount receiving:

○ Have you previously defaulted on a student loan?

○ Do you owe money on a student loan? If so, how much?

○ Are you receiving funding from other sources?

○ What is your current work situation?

○ Income source and amount:

○ Do you plan to work while continuing your education/training?

Will you need supports in any of these areas?

Housing: Transportation:

Childcare: Other:
**EDUCATIONAL GOAL PLAN**

Long-term Educational goal: ________________________________________________

Short-term (3 months) educational goal: ____________________________________

<table>
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<th><strong>Short Term Action Steps</strong></th>
<th>Responsibility</th>
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<th>Comments</th>
<th><strong>Date Step Completed</strong></th>
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Name________________________________________________ Date______________

Supported Education Specialist:___________________________ Date______________
Some people who use supported education services choose to disclose their disability to the educational institution which they plan to attend and others choose not to. Most people choose to disclose in order to have access to formal accommodations. Some students choose informal services in place of formal services such as sharing notes other students instead of getting a formal note taker. There are lots of options, for instance, some individuals choose to disclose to their peers, but not to instructors, or to disclose to the accommodations office, but not to their peers. There are advantages and disadvantages to all of these approaches. It is important for you and your supported education specialist to talk about the pros and cons of these options. This form is meant to help you determine what type of disclosure decision is right for you.

**Common Reasons Not to Disclose:**
- Some students fear the stigma that may be attached to disclosing a mental illness.
- Some students don’t mind if the accommodations office and teachers know but don’t want their peers to know.
- Some students choose not to disclose formally to the school, but rather disclose informally to people they choose.
- Some students say that they don’t want to disclose because they are working on recovery and want build responsibility through trying out school without disclosure.
- Some students just don’t feel that disclosure for accommodations purposes is necessary. They feel pretty sure that they can be successful without it.

**Common Reasons to Disclose:**
- Some students want to get formal help (accommodations) with coursework, tests, tutors, and other school assignments when needed.
- Some students choose to disclose even though they don’t currently need accommodations just in case they decide they do in the future.
- Some students choose to disclose to get in-class help from teachers who know about the unique challenges faced by individuals with a psychiatric disability.
- Some students choose to disclose so their supported education specialist might be able to advocate for them. For example, if your psychiatric disability made it difficult for you to complete some course requirements the specialist may be able to talk to your instructor and other school officials to help extend deadlines. The school may not agree with your educational specialist, but the educational specialist will be there to help regardless.
When educational specialists talk to school accommodations offices, it is usually possible for them to keep some things private. For example, some people don’t want their educational specialist to share information like diagnosis or medications. Talk this over with your educational specialist and write down the things that you wouldn’t want the specialist to share with an educational institution.

____________________________________________________________________________________________________________
____________________________________________________________________________________________________________
____________________________________________________________________________________________________________

Some people choose to only disclose elements of their psychiatric disability that interfere with educational goals. For example, some psychiatric symptoms interfere with concentration making it important to have additional time to take tests. If you were disclose your disability, what aspects of your disability would you disclose?

____________________________________________________________________________________________________________
____________________________________________________________________________________________________________
____________________________________________________________________________________________________________

Here you can write down some of your personal thoughts about disclosure.

<table>
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<th>Reasons for Disclosing to __________ (ex: teachers, peers, financial aid etc.)</th>
<th>Reasons for Disclosing to __________ (ex: teachers, peers, financial aid etc.)</th>
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<table>
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<th>Reasons for Disclosing to Accommodations Office</th>
<th>Reasons for Not Disclosing to Accommodations Office</th>
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</table>
For now, what is your preference about disclosing to your educational institution?

____ I don’t want to disclose formally or informally.

____ I want to disclose to the accommodations office but not teachers or students.

____ I want to disclose to my teachers and accommodations office but not to other students.

____ I want to disclose informally to students but not to teachers or the accommodations office.

____ I don’t mind disclosing to anyone at the school.

____ I am not sure right now and I would like some more time to think about this and receive some more information.

____ Other

____________________________________________ _____________
Client                                                                                 Date

____________________________________________ _____________
Educational Specialist                                                       Date
### Supported Education Quarterly Update Checklist

**Participant Name:** _______________________________

**Worker:** _______________________________

**Date Checklist Completed:** _______________________________

**Initial Enrollment _____ Ongoing Enrollment _____** (Check One)

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</table>
1. Has the client’s goal changed during the past quarter? Yes_____ No_____
   If so, what is the new goal:
   ____________________________________________________________________________________________

   Has Tx plan/goal plan been updated? Y / N Date in chart: ______________
   Is the SEd goal stated in quotations (indicating consumer preference)? Y / N
   Are there long-term academic objective(s)? Y / N

2. Has the client achieved any short-term steps?
   ____________________________________________________________________________________________
   ____________________________________________________________________________________________
   __________________________
   Short-term action steps in goal plan (with target completion dates and responsibilities cited) Y / N

3. What barriers or challenges have been addressed in the past semester?
   ____________________________________________________________________________________________
   ____________________________________________________________________________________________
   __________________________

4. Have new barriers been identified?
   ____________________________________________________________________________________________
   ____________________________________________________________________________________________
   __________________________

5. Describe the progress towards the goal during the last quarter:
   ____________________________________________________________________________________________
   ____________________________________________________________________________________________
   ____________________________________________________________________________________________
   __________________________________________
6. What collaboration or communication has occurred with other treatment providers in goal planning?

____________________________________________________________________________________________________________

____________________________________________________________________________________________________________

________________________

Info note in file?  Y / N  Date:______________

7. Dates you met with consumer during the quarter:

____________________________________________________________________________________________________________

____________________________________________________________________________________________________________

________________________

(If you did not meet with consumer submit info note explaining circumstances)

*Note: SEd workers should ensure that all of the above services in the checklist are provided as needed. Workers do not need to provide these services themselves necessarily, but do need to ensure that they are completed. Tracking who completed the task (e.g. participant, case-manager, peer support worker, SEd worker, or other) and the date completed ensures that these services are provided. In the name category do not write the persons title, simply insert the name of the person who completed the service.
SECTION 4:
Bibliography
Supported Education Toolkit 3.0

SUPPORTED EDUCATION BIBLIOGRAPHY


education and employment services. *Journal of Rehabilitation*.


Morrison, I., Clift, S. M., & Stosz, L. M. (2010). Supported further education provision for people with long-term mental health needs:


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Compiled by Trevor Manthey, MSW, Ph.D. Candidate. Please email Trevor at trevormanthey@gmail.com if you would like to include additional resources or suggestions for the next iteration of this bibliography or toolkit.