Trauma-Informed Care IC
Performance Monitoring Tool (PMT)

Tracking progress is an important part of systems change. In order to be successful; primary care organizations should have a clear understanding of where they are starting, where they want to go, and tools to measure their progress along the way. This allows team members and others interested in the work to remain enthusiastic and to determine what is working and what is not. It creates the opportunity for the team to regroup, refocus and monitor momentum. This simple tool is one way to stay on track.

*Your team will submit the Performance Monitoring Tool (PMT) to your National Council faculty lead two times during the duration of the Innovation Community.*

Once submitted; your faculty lead will schedule a team call to review your progress, help you think through your next steps and address any challenges your team might be facing.

**Contact Information**

**Name of Organization**

**Your Name**

**Your E-Mail**

**Date of Submission**
INFRASTRUCTURE DEVELOPMENT

1. Does your Core Implementation Team (CIT) continue to meet at least twice each month?
   □ NO
   □ YES
   If yes, how often does the CIT meet? ________________________________
   How long does the CIT meet? ________________________________

2. Do you have a larger oversight team or committee that supports Trauma-Informed Care (TIC)?
   □ NO
   □ YES (we started this prior to the Learning Community)
   □ YES (we started/expanded this since we joined this Learning Community)
   If yes, how often do they meet? ________________________________
   Who is on the oversight team?

3. Has your organization expanded the number of staff members involved in TIC related workgroups beyond the CIT? (e.g., domain specific workgroups)
   □ NO
   □ YES (we started this prior to the Learning Community)
   □ YES (we started/expanded this since we joined this Learning Community)
   If yes, describe your efforts to expand the number of staff members involved in TIC workgroups or teams:

Additional accomplishments, key challenges and future plans related to infrastructure:
Domain 1: EARLY SCREENING AND COMPREHENSIVE ASSESSMENT

1. Are Medical History/Health Forms or Trauma Screening Tools used to routinely screen for trauma?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
     If yes, what type of instrument do you use? ________________________________
     How many clients were screened for trauma? ________
     How many clients screened positive for trauma? ________

2. Has your medical staff been trained to screen for trauma in a competent and sensitive manner and assist clients to make the connection between trauma and PH/MH/SA concerns?
   - □ No
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
     If yes, how many staff members have been trained? ______

3. Is there a system in place to periodically re-screen clients who were initially screened as having none to few adverse life events?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
     If yes, when is this done? Individual BH Sessions_______ Primary Care Visit_______
     Other________________________________________

4. Is there a system in place to immediately respond to reports of current and harmful adverse life experiences such as domestic violence or community violence?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)

5. Are clients who have received a positive assessment of trauma engaged in considering brief or longer term trauma-specific services provided by the health center or an external provider?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
     If yes, which of the following processes/treatments do you use?
     Internal Referral _______ External Referral _______ Brief TX _______ Long Term TX_______

6. For those clients needing referral to internal or external BH services, is a staff member identified to monitor the referral process until the client keeps their first appointment?
□ NO
□ YES (we started this prior to the Learning Community)
□ YES (we started/expanded this since we joined this Learning Community)

If yes, what is the title of the person monitoring this process?
________________________________________________________________________

What is the number of appointments that have been kept through this process? ________

Additional accomplishments, key challenges and future plans related to this domain:

______________________________
Domain 2: CLIENT VOICE, CHOICE AND COLLABORATION

1. Is there a system in place to collect, analyze, and utilize client satisfaction and perception of care including feedback related to physical and emotional safety?
   - NO
   - YES (we started this prior to the Learning Community)
   - YES (we started/expanded this since we joined this Learning Community)
     If yes, what tools have been used?
     __________________________________________________________
     How often is feedback collected?
     __________________________________________________________

2. Are recipients of care involved in organizational meetings that influence decisions?
   (Check all that apply)
   - NO
   - YES
     If yes, which of the following applies? Advisory councils/boards/committees ________
     Formal Focus Groups ________ Other: ____________________________________________

3. Are information and education provided to clients to explain the impact of adverse life events on a person’s whole health?
   (Check all that apply)
   - Trauma-specific informational brochures
   - Trauma informational poster
   - Trauma education groups
   - Other: ______________________________________________________________________

Additional accomplishments, key challenges and future plans related to this domain:

________________________________________________________________________________

________________________________________________________________________________
Domain 3: WORKFORCE DEVELOPMENT AND BEST PRACTICES

1. Do all levels of staff receive education about their role in promoting safe and healing relationships through an in-service program and/or external opportunities designed to increase staff skills and knowledge of trauma and trauma informed/sensitive practices?
   - [ ] NO
   - [ ] YES (we started this prior to the Learning Community)
   - [ ] YES (we started/expanded this since we joined this Learning Community)
     If yes, how many staff members have been trained? ______

2. Do behavioral health and primary care specialists receive education and training on sensitive screening and assessment practices and procedures?
   - [ ] NO
   - [ ] YES (we started this prior to the Learning Community)
   - [ ] YES (we started/expanded this since we joined this Learning Community)
     If yes, how many staff members have been trained? ______

3. Do on-site behavioral health specialists receive education and training to ensure that they are equipped to deliver brief, evidence-informed individual and group treatment interventions?
   - [ ] NO
   - [ ] YES (we started this prior to the Learning Community)
   - [ ] YES (we started/expanded this since we joined this Learning Community)
     If yes, what types of training have been received? ________________________________

4. Have all new and current employees received training on trauma informed care principles and practices?
   - [ ] NO
   - [ ] YES (we started this prior to the Learning Community)
   - [ ] YES (we started/expanded this since we joined this Learning Community)

5. Is a process in place to engage in client-centered, shared care planning between disciplines?
   - [ ] NO
   - [ ] YES (we started this prior to the Learning Community)
   - [ ] YES (we started/expanded this since we joined this Learning Community)
6. Does a strong system of collaboration, communication, and team-based, client-centered, coordinated care exist between behavioral health and primary care staff?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
   If yes, what process is this done through (check all that apply):
     - □ Cross training
     - □ Informal/formal meetings
     - □ Team huddles
     - □ Other ________________________________

7. Is a system in place to educate all staff about compassion fatigue, secondary traumatization, and burnout?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
   If yes, how many trainings have been held on these topics? ______

8. Are policies and procedures in place to address staff wellness?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
   If yes, what types of wellness policies have been developed? ________________________________

Additional accomplishments, key challenges and future plans related to this domain:
Domain 4: SAFE AND SECURE ENVIRONMENT

1. Do all levels of staff receive education about their role in promoting safe and healing relationships?
   □ NO
   □ YES (we started this prior to the Learning Community)
   □ YES (we started/expanded this since we joined this Learning Community)

2. Is a system in place to monitor and evaluate changes made to the environment that promote safety and comfort?
   □ NO
   □ YES (we started this prior to the Learning Community)
   □ YES (we started/expanded this since we joined this Learning Community)
   If yes, list changes made to the environment: ________________________________

3. Is a system in place to assess and address environmental concerns that may affect safety, security, comfort and respect for both clients and staff?
   □ NO
   □ YES (we started this prior to the Learning Community)
   □ YES (we started/expanded this since we joined this Learning Community)
   If yes, what types of assessments have been used? ________________________________

Additional accomplishments, key challenges and future plans related to this domain:
Domain 5: DATA COLLECTION AND PERFORMANCE IMPROVEMENT

1. Is a system in place to track and analyze performance on one or more trauma-informed care domains in a way that effectively addresses challenges and reinforces progress?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)

2. Is a system in place to collect, analyze, and utilize data designed to assess the degree to which the organization is accomplishing its aims related to adopting the principles and practices of trauma-informed care?
   - □ NO
   - □ YES (we started this prior to the Learning Community)
   - □ YES (we started/expanded this since we joined this Learning Community)
     If yes, through which of the following methods is data collected?
     - EHR
     - Electronic Registries
     - Manual Tracking Logs

3. Data collected includes which of the following?
   (Check all that apply)
   - □ Number of clients screened for trauma
   - □ Number of clients with positive screen for trauma
   - □ Number of clients with a positive screen that receive a comprehensive trauma assessment
   - □ Number of clients referred to on-site trauma-specific services (individual and/or group)
   - □ Number of clients referred to off-site trauma specific services (individual and/or group)
   - □ Number of clients who accept referral and attend trauma specific services
   - □ Pre and post survey of clients experience of onsite trauma-specific services
   - □ Client health outcomes specific to the needs of the population served

Additional accomplishments, key challenges and future plans related to this domain: