Talking About Fidelity

Proper Use and Understanding of Assessing Fidelity

Fidelity assessment is a way to assess the behavior of an organization by its component parts to reveal the extent to which the organization is doing the things it expects or desires to do in implementing a practice model. Specifically, the use of the Core Practice Model (CPM) fidelity measurement tools works to identify the extent to which the Leadership (and later the family level) CPM Behaviors and Implementation Supports are active.

The Leadership component parts of the organization, for which there are customized Leadership Fidelity Assessment tools, are:

- Director level
- Manager level
- Supervisor level

While there are separate instruments developed for Directors, Managers, and Supervisors, all three instruments measure the same areas of CPM leadership with only slight variations, where necessary, in what the behaviors looks like at that level.

The 14 areas being measured are:

- Communicates in an open, honest, clear and respectful manner
- Creates a learning environment
- Engages staff in implementation and system improvement
- Shows that he/she cares
- Recognizes staff strengths/ successes.
- Seeks feedback
- Promotes advocacy
- Advocates for resources
- Builds partnerships
- Works with partners
- Models teaming
- Listens and provides feedback
- Monitors Organizational Effectiveness
- Monitors practice effectiveness

The use of these Leadership Behaviors are essential even in doing this work of fidelity assessment. As you or your team goes through this document notice where those behaviors come into play.

At the family level Social Workers will be the focus of a fidelity measurement process that is yet to be developed. This process will identify fidelity to the CPM Practice Behaviors. An assessment of the agency's Implementation Supports is also in development. Collectively, these measures will help in understanding how implementation is going within the agency as well as provide a critical link between CPM implementation and outcomes to better understand the impact of the practice model on children and families.

The motivation to understand organizational fidelity is to first, be aware of where the organization is in its journey to establish the CPM as the way that families experience the organization and that the staff of the organization experience the organization's leadership. Secondly, the intent is to know where CPM implementation is going well and identify ways in which that can be sustained and spread. Lastly it is important to understand where there are challenges and identify ways in which Leadership, Social Workers and other staff may be struggling or experiencing barriers and then identify strategies and supports that will promote their success.

Fidelity assessment is an important part of creating a learning environment and engaging everyone in implementation. It sets up clear transparent processes for assessing leadership, practice and organizational supports in a way that provides ongoing data for learning and system improvement. Rather than focusing on individual performance, fidelity assessment helps everyone get on the balcony, focus on organizational behavior, and work together to support incremental changes.

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The strong communication of the perspective of using system awareness to build system support for the practice model encourages respondents to be clear minded and honest in their rating. There is no advantage to scoring higher based on hopes or credit for good intentions as this will mean that opportunities for growth will be obscured. The objective is not to have the highest score possible but to have the most reality based understanding of strengths and growth opportunities at all levels of the organization and across implementation supports.

The reporting of the Leadership Fidelity Assessment scoring can be done by level but certainly should be done collectively across levels as well. Because this is not intended to be a measure of an individual the scoring should be reported collectively for each level. There will be an anomaly to this at the Director level and at times in smaller agencies at the Manager or Supervisor level when there are only one or two at that level. In these situations, as the Director, Manager, and Supervisor tools include the same 14 leadership areas, it is possible to report aggregate scores across leadership levels to encourage teaming and a thoughtful use of the data.

Ways to Use the Leadership Fidelity Tool	
Self- rating	The simplest is for individuals to rate themselves. Individual ratings are not reported out (with the possible exception of the Director level) but collective information is reviewed to support sustained or improved fidelity.
Partner-rating	Another option is to have others who work directly with that person to rate them. This communicates an openness to feedback and creates the opportunity to compare a self-rating with the aggregate ratings of those who rated them. This is most obviously applicable at the Director level because at that level there is typically only one and the "360" view allows there to be a broader perspective creating the ratings. This 360 view could also be effective at the Manager and Supervisor levels as well, as long as the work staff culture at those levels are sufficiently prepared to use the experience and ratings properly - as an opportunity to support improvement collectively and not to spotlight an individual.
Observer-rating	A third option is to identify selected behaviors in the Leadership Fidelity Assessment tool that would be expected at a particular event such as a staff meeting, community meeting or family team meeting and to have selected observers rate for those behaviors during that event. Local decisions would need to be made as to how to effectively process that information so the focus remains on the organization and does not spotlight individuals.

Staff Engagement with the Process

Before the actual use of the Leadership Fidelity Assessment it is important that the Leadership team meet and consider some important questions:

- Where do you see your staff's progress in understanding the practice model and how it is intended to be used both on the front line and by leadership?
- Are staff in different places of development based on being a Director, Manager, Supervisor, or Social Worker?
- What strengths do you see in your team that will help this assessment process?
- What worries do you have about using the assessment tool?
- What group agreements are important to establish when rating another person? For instance, it can be important to establish agreements such as anonymity, respect, and nonjudgmental assessment of another's behaviors (rather than intent).

The process will have four overall stages:

1	2	3	4
Orienting Staff to the Tool	Completing the Tool	Scoring the Tool and Processing Results	Review of Results and What's Next?

1. Orienting Staff to the Tool

When engaging in an assessment process, there are 14 major leadership areas in the tool. Each includes four bullet points which are behavioral indicators of that leadership area. Rate each bullet point to indicate the extent to which you or the person you are rating exhibits that behavioral indicator.

The four options are:

- **Not At All**
- **Sometimes**
- **Consistently**
- **Outside the Scope of my Interaction** (*This should be used sparingly and only for those areas where in rating someone else you believe that it could be happening but don't know directly because you don't interact in that realm*.)

In the box below each set of four bullets, list evidence for the rating as well as any other comments.

2. Completing the Tool

The tool can be completed as a self-assessment, as well as ratings by others and observation. This can be done at one time in a meeting or individually by a specified deadline. The prior method will increase completion but it may sacrifice more considered responses.

The completed tools are given in person or via email to the compiler who will then convert respondents ratings for each of the four indicators into a scale from zero to four for each of the 14 leadership areas along with an overall fidelity score. The conversion chart and an explanation of how to utilize it is found in Appendix A. Those scores will be used for an aggregate report. Reports of individual scores are not reported because the idea is to understand and support the organization as a whole and not to invite comparison or a sense of someone being better or worse. This focus also encourages Leadership teams to think about their collective impact and success, as well as have frank discussions about areas that reveal a need for growth.

3. Scoring the Tool and Processing Results

The responses for the four behaviors in each area will translate into a fidelity level for that area from "0" to "4." Each number can be understood as the place on the road to fidelity for that area. The very beginning of the journey is at "0" and arrival is at "4." The numbers in between indicate progress for the time frame at which the tool was completed. An area where the rating is "4" may still need support as it is possible to move backwards at a subsequent time. The total of those 14 numbers ("0s" "1's" "2's" "3's" and "4's") will provide an overall fidelity score which indicates the following.

Accomplished range	43-56
Acquiring range	25-42
Emerging range	8-12
Practice Note Yet Evident range	0-7

In order to support honest ratings and honest reporting of the degree to which key areas of leadership are in place in the agency, it is helpful to support an environment of anonymity. One element of this is to have a neutral party (inside or outside) be the recipient of the completed tool as well as the compiler of the data and creator of the aggregate report.

Reports can take various forms. At the Director level it can be a comparison of the self-report with the average scoring of Managers or others with direct interaction with the Director. An example of this format is **found in Appendix B.** The anonymity of the Director's self report is not preserved with this report so Directors need to be able to evaluate the prudence of that choice. There is great value in the expression of vulnerability and commitment to growth that choosing to be public with that information displays.

At other levels such as Manager and Supervisor it is best to aggregate the information and provide both an average score across respondents for each leadership area as well as the range, low to high. As an alternative to reporting a range, with a large number of respondents (more than 14 or so) you might be able to identify the actual of numbers of respondents identifying each fidelity level from 0 to 4 for each of the 14 leadership areas. For example: One "0" Three "1's" Two "2's" Six "3's" and Two "4's" for an average of "2.36".

4. Review of Results and What's Next?

Once the Leadership Fidelity Assessment tool has been completed, either as a self-assessment or by persons experiencing your leadership or a combination of both, bring a group together (that includes at least the level of persons who have been assessed or who have completed the tool) to review the results, celebrate strengths, and determine what steps can support growth.

Overall Fidelity Score: The total score of the whole tool provides an indicator of overall level of practice in utilizing and demonstrating CPM Leadership Behaviors. As indicated in the tool the levels are *Not Yet Evident, Emerging, Acquiring, or Accomplished*. The larger goal is to grow to the point of being *Accomplished*.

Scores for the 14 Leadership Areas: Another way of using the tool is to identify needs and strengths in the demonstration of specific areas of leadership. No matter the overall rating it is likely that there will be a mix of items rated at various points on the scale. While the overall fidelity score may be in the *Accomplished* range there may be some areas of leadership scored at 2 or lower. Those areas might be identified as growth opportunities. Conversely the total score may be in the *Emerging* range but some areas of leadership might be rated 3 or higher. Those areas might be used as strengths to support the efforts to grow in other areas. The tool therefore can be used as an assessment to identify areas where action is desired to support growth as well as areas that are already strong which can be sustained and supported.

What's Next: Remembering that improvement and growth are the work of the agency as a whole and that success and growth are best achieved with the support of the system, even for leadership, the essential question is what will the system and the individual leader(s) within it do to sustain strengths and build in the areas where a need for growth is indicated. The following are some possible discussion points that might facilitate such planning:

- What thoughts do you and your Leadership Team have about what you will do with the information the fidelity tool has lifted up?
- How might you and your Leadership Team recognize any strengths the fidelity tool identified?
    - What is the connection between the identified strength and a positive impact on the agency, it's staff, and/or the families experiencing the system?
    - Are people within or outside the agency aware of those strengths and their impacts? Has success been celebrated?
- Which of the leadership areas are priorities for the overall growth and success of your agency and the people within it? There may be more places to grow than can be addressed in the present moment so strategically identifying priorities will identify where to start.
- In exploring how to work on priority areas what is working now or what has worked in the past? Can those supports or strategies be bolstered or revived?
- How might you and your Leadership Team support one another in areas identified for growth?
- Are there supportive resources available inside and/or outside of the agency that could be accessed?

Data for Ongoing Learning and Improvement

Because the agency's efforts to grow are ongoing and agencies experience constant transitions, it is important that the data results and reports for fidelity assessment be maintained in an organized system to allow for tracking over time as a part of the work of Continuous Quality Improvement (CQI) and the System Improvement Plan (SIP) process. Fidelity data at various points in time will be invaluable in helping agencies interpret the extent to which the practice model is being implemented and how that relates to improved outcomes for children and families.

Support

Contact your Regional Training Academy for questions or support in the process.

Appendix A: Scoring the 14 Leadership Areas

In each of the 14 major leadership areas in the tool, the rating of each of the four bullet points will indicate the extent to which you(if you are rating yourself) or the person being rated exhibits that behavior. The ratings are as follows:

- (N): Not At All
- (S): Sometimes
- (C): Consistently
- (O): Outside the Scope of my Interaction

A combination of these ratings is represented by one of the rows in the graphic below. Every possible combination of ratings will be found in one of the four boxes. The box represents the score for that area.

For example if the area is, "Promotes Advocacy", and the behaviors are scored as:
"C" "C" "S" "N", that combination is found at the bottom of the box, "TWO", so the score for the area "Promotes Advocacy" would be 2.

Another example is if the area is "Seeks Feedback" and the behaviors are scored as:
"C" "N" "N" "S" that combination is found at the bottom of the box,"ONE", so the score for the area, "Seeks Feedback", would be 1. Notice that the order that they appeared in was insignificant. It is just the collection of that combination of 4 ratings.

The translation of the four rated behavioral indicators into a numerical score from zero to four would be done for all of the 14 leadership areas. By adding the scores for all of the behaviors a total score is calculated.

It is important to remember that these results are aggregated and averaged for all respondents at each level, or as a whole for the organization, and are not reviewed on an individual level except possibly at the deputy/director level because there is often only one person at that level.

Zero			
N	N	N	N
N	N	N	O
N	N	O	O
N	O	O	O
S	N	N	N
S	N	N	O
S	N	O	O

One			
S	O	O	O
S	S	N	N
S	S	N	O
C	S	N	N
C	S	N	O
C	N	N	N
C	N	N	O
C	N	O	O

Two			
C	O	O	O
S	S	O	O
S	S	S	N
C	S	O	O
C	S	S	N
C	C	N	N
C	C	N	O
C	C	O	O
C	C	S	N

Three			
S	S	S	S
S	S	S	O
C	S	S	S
C	S	S	O
C	C	S	O
C	C	S	S
C	C	C	N

Four			
C	C	C	O
C	C	C	S
C	C	C	C

Appendix B: Scoring the 14 Leadership Areas

County	**County X**
Person Being Rated	**Director Y**
Date	**July 15, 2019**

Self	Others	High	Low	
2	2.6	4	2	**Communicates in an open, honest, clear and respectful manner**
3	2.9	4	2	**Creates a learning environment**
2	2.3	3	0	**Engages staff in implementation and system improvement**
3	2.1	3	1	**Shows that he/she cares**
1	1.3	3	1	**Recognizes staff strengths/ successes.**
2	2.3	4	0	**Seeks feedback**
2	2.1	4	0	**Promotes advocacy**
3	3.0	4	1	**Advocates for resources**
3	3.1	4	3	**Builds partnerships**
3	2.9	4	2	**Works with partners**
2	2.9	4	1	**Models teaming**
2	2.3	4	1	**Listens and provides feedback**
3	2.7	4	1	**Monitors Organizational Effectiveness**
2	2.3	3	1	**Monitors practice effectiveness**
33	34.4	49	20	TOTAL SCORE

***Accomplished* range: 43 -- 56** ***Acquiring* range: 25 -- 42** ***Emerging* range: 8 – 24**