



Performance-*based*
Standards



Candidacy Application Guide

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Introduction

Thank you for your interest in applying to be a participant of Performance-based Standards (PbS).

What is PbS?

PbS is a data-driven improvement model grounded in research that challenges youth correction, detention, assessment and community-based facilities, programs and agencies to treat all youths in custody as one of our own. PbS sets national performance-based standards of excellence to guide facility operations, services and programs to best serve youths, staff and families. PbS provides tools, training, technical assistance and expert coaching to continuously monitor daily practices and facility culture with performance outcome measures. Over the past 20 years, PbS uniquely has established uniform data definitions and a quality assurance process that creates the most timely, comprehensive and accurate national database of its kind.

PbS is a holistic management tool. PbS standards address facility safety, security, order, programming and fairness as well as services provided to respond to youths' needs for physical health, behavioral health, substance use, education, vocational education, reentry planning and connection to family and community. Performance achieving the standards is measured by both quantitative and qualitative data from administrative forms, youth records, incident reports, climate surveys of youths, staff and families and exit interviews of youths (only those leaving long-term correction facilities.) PbS trains and supports participants to collect the data, analyze the results and use them to change practices using a structured and measurable improvement planning process.

Why was PbS developed?

The Congressionally-mandated 1994 Conditions of Confinement Study (COC) of more than 1,000 secure facilities for young offenders reported "substantial and widespread deficiencies," including crowded facilities, high rates of assaults, injuries and suicidal behavior, little timely medical care and high levels of staff turnover. The study concluded that adherences to the existing policy-based or checklist standards had no impact on facility conditions or quality of life- and that what was on paper was not what was happening in the facilities.

The study and subsequent discussions prompted a call for the development of standards for youth facilities based on performance, not policy, and a set of outcome measures that would continuously count and monitor facility practices, events and activities. In response, the US Department of Justice, Office of Justice Programs, Office of Juvenile Justice and Delinquency Prevention (OJJDP) launched the



PbS project to develop and implement national performance-based standards across the country. The project was awarded to the Council of Juvenile Correctional Administrators (CJCA), the national organization representing youth correction agency directors. In contrast to on-time pass/fail check list approaches to monitoring facilities, PbS reports were developed to be produced twice a year, showing change over time, and available in a timely manner so the information can be used to catch problems as they appear and continually improve operations and services.

PbS' success at uniquely and effectively improving conditions of confinement in youth facilities was recognized as a winner of the 2004 Innovations in American Government Award by the Ash Institute for Democratic Governance and Innovation at the John F. Kennedy School of Government at Harvard University.

What are the tools PbS provides?

- PbS goals and standards establishing expectations of excellence¹;
- Outcome measure reports twice a year that show individual facility performance over time as well as compared to the national field average;
- Survey summary reports twice a year that show the aggregate responses of youths, staff and families to questions about facility safety, fairness, access, services, relationships and related perceptions;
- The PbS Blueprint of practices and policies that lead to the desired outcomes based on research and/or best practice experience;
- Training and technical assistance, including an annual national training for state/agency coordinators and regular webinars for all participants;
- Year-round coaching by an agency/ facility expert via phone and email and one annual site visit;
- Resources and research to support and guide implementation of PbS, facility best practices and positive youth development; and
- Community and national network of professionals sharing resources, solutions and passion for youth justice.

¹ PbS' goals and standards were developed to frame a continuous improvement process that could be implemented in youth facilities. PbS goals are written to encourage growth and improvement over time – increases of what works, decreases in what's ineffective or dangerous. PbS standards explain how facilities demonstrate proficiency meeting the goal; the standards identify activities and daily operations that research and best practices have shown align with the highest quality conditions of confinement, facility environment, culture, operations and services and result in positive outcomes for youths, staff and families.



How to Apply

Candidacy Application Process

1. Complete an application for the site or jurisdiction on the PbS website. Completed applications can be submitted anytime during the year but should be submitted by June 1st for the October data collection and by December 1st for the April data collection. You must indicate the program type for the facility(s).
 - a. **Assessment:** a facility or unit where both pre- and post-adjudicated youths are held to conduct diagnostic and assessment tests in order to determine the most appropriate placement, services, and/or treatment program(s) to best meet the juvenile's needs.
 - b. **Community:** Residential programs that a youth might participate in once he or she leaves a facility. (*Community residential programs do not go through the Candidacy Process, please refer to the Community Residential Programs application in the How to Join section.*)
 - c. **Correction:** Facility classified as training school, treatment, and/or residential institution/program for juvenile offenders or delinquents, committed by the court to the care and custody of a jurisdiction for a determinate period.
 - d. **Detention:** a temporary and safe custody for juveniles who are accused of conduct subject to the jurisdiction of the court who require a restricted environment for their own or the community's protection while pending legal action.
2. Applicants will receive an email confirming the receipt of the application.
3. The PbS Implementation Director will contact you to arrange a date for an application interview. This interview will help PbS determine your available resources and the specific needs for your jurisdiction.
4. PbS staff will review the application and information obtained from the interview. Applicants will be notified of their status via e-mail and receive a welcome package that includes a service agreement and invoice.
5. Upon receipt of the signed service agreement, the PbS Implementation Director will contact the site or agency to establish dates and times regarding the first candidacy training.

PbS staff will work with your jurisdiction to prioritize a PbS implementation strategy. This will provide the greatest benefits in a timely and efficient manner in order to maximize the value to your



facilities. Our experience over the years has also shown that statewide participation leads to deeper, more sustainable improvement in conditions of confinement for youths and facility work environment for staff. In order to get the most benefit from PbS participation, each jurisdiction should also consider specialized/distinct programs or units at each facility as separate. Before completing the application, please review the requirements for analysis of facility participation in *Appendix A*.

PbS Candidacy

The Candidacy Program

Upon acceptance, new jurisdictions enter the PbS Candidacy Program for the first 12 months of participation. The purpose of candidacy is to work closely with sites to enhance meaningful participation in a timely and effective manner. PbS staff provides intensive training and support to guide new facilities through the orientation and first two cycles of PbS data collection, analysis and improvement planning. The PbS Candidacy Program ensures that participants have a solid understanding of the PbS program and its implementation and that the data contributing to the field average is accurate and rich.

Services

The PbS Candidacy Program is customized for each jurisdiction during the first 12 months of a jurisdiction's participation. PbS provides the following services:

- On-site PbS Orientation Training provided at a centralized location before the first data collection;
- On-site Data Analysis Training provided after the first data collection;
- Unlimited consultation and technical assistance provided by the PbS Implementation Director and PbS Help Desk via telephone and e-mail;
- Annual site visit to verify site(s)' PbS data collection, continuous improvement processes and achievements;
- Training via Distance Learning Webinars and customized webinars;
- Access to on-line tools and resources to analyze data;
- Research-based analysis correlating data to impact change;
- Access to national network of other participating PbS facilities;
- Two reports on facility conditions of confinement: quality of life, safety, order, security, sense of fairness, health/mental health, programming, education, re-entry planning services;
- Access to PbS resources, conferences and staff; and
- Bi-annual strategic review of issues to promote long-term sustainability.



Costs

The cost for the first year of participation in the PbS Candidacy Program is \$16,000 per facility. Following successful completion of the PbS Candidacy Program, costs are lowered to \$10-\$12,000 for subsequent years depending on the number of sites participating in the jurisdiction. Deliverables provided by PbS during the candidacy period include:

- An annual PbS Site Visit report and Facility Improvement Plans (FIP) consultation;
- Draft site report;
- Critical Outcomes Report (two annually) focusing on the safety and health issues within facilities;
- Performance Profile reports providing a summary of outcomes following each data collection showing improvement compared to the field average;
- Downloadable outcome measure reports - all or individual outcome measures;
- Jurisdictional Profile Reports showing all participating facilities in a state or jurisdiction;
- Summary reports of survey responses;
- Outcome Measure Comparison Reports – all or individual outcome measures; and
- A kiosk to survey youths, staff and families members, which uploads the data directly to the PbS website.

Paying for PbS

PbS can save facilities and agencies money. Proactively avoiding potential incidents before they occur reduces exposure and liability to lawsuits and [reduces worker's compensation costs](#).

Agency Funding

- Most jurisdictions report paying through direct agency funding or appropriation

Grant Funding such as

- Juvenile Accountability Block Grants (JABG)
- Edward Byrne Memorial Justice Assistance Grant (Byrne JAG) Program

Other Government Funding Sources

- Medicaid is one example for a mental health focused program



Requirements

Required Equipment (for Additional Information, refer to Appendix B.)

- Uninterrupted Internet access;
- Internet Explorer 6 or higher (also compatible with Mozilla Firefox, Apple Safari and other popular browsers);
- An active e-mail with the ability to send e-mails outside the agency; and
- Adobe Acrobat Reader 6 or higher (available for free download at: <http://www.adobe.com/prodindex/acrobat/readstep.html>)

Required Staff Resources

One of the most important keys to success in PbS is your agency and facility PbS team. The team should be comprised of the following:

- Agency Director/CEO;
- State or Agency Coordinator;
- Facility Administrator;
- Site Coordinator; and
- Representatives from all facility program areas (security, social services, mental health, medical, education, recreation, administration, and youth involvement).

PbS state/agency coordinators are the designated leaders in jurisdictions with multiple sites, for a state or in a county or similar group of administrative organization, serving as the liaison connecting PbS to daily program operations, staff, youths and families as well as to state/agency directors. PbS state/agency coordinators are the champions for improvements and reforms; they motivate their colleagues to continually measure and monitor the impact they have on facility culture and effectiveness of services and they model PbS' commitment to treating all youths in custody as one of our own. In a jurisdiction with only one site, the facility administrator fulfills the role of the state/agency coordinator for the site. (See Appendix C.)

PbS facility administrators lead and support PbS participation to ensure the PbS program is properly implemented and integrated throughout facility operations. PbS facility administrators promote PbS and continuous improvement through effective communication among all facility departments and engaging the PbS team. (See Appendix D.)

PbS site coordinators lead the PbS team and improvement effort in juvenile facilities to ensure the PbS program is properly implemented and integrated throughout facility operations. The site





coordinator coordinates all aspects of PbS and works with the facility administrator, state coordinator and PbS coach to promote PbS and continuous improvement. (See Appendix E.)

Depending on the size of your facilities the time devoted to PbS will vary. During the months of April and October the vast majority of participants will have their Site Coordinators spending 10-20 hours per week. If a PbS team has been established, this workload can be spread out over several staff. Feedback from participants indicates that where PbS is integrated into the everyday life of a facility the collection of data becomes routine and also one that quickly identifies trends in the safety and security of a site.



Appendix A

Requirements for Analysis of Facility Participation in PbS for Creating Distinct Programs

Specialized/Distinct programs designated to address the needs of youth at the facility. These are programs within correction, detention or assessment centers that would benefit from a more strategic profile of program performance. The distinct/specialized programs may include:

- Mental Health/Substance Abuse
- Mental Health
- Substance Abuse
- Sex Offender
- Leadership
- Violent Offender
- Youth Offender
- Pre-release/Transition
- Orientation/Reception
- Parole Violators
- 18 years or older
- Transgender population

The distinct programs may have centralized/shared administration and need to be able to identify the following information for all PbS data collections:

1. Distinct program daily population: _____
2. Distinct program direct care staffing: _____
 - a. Distinct shared direct care staffing (educational, medical, food service, etc...): _____
3. Meeting sample size for each distinct program for PbS data collection forms: Youth Records, Staff Climate Survey, Youth Climate Survey and Youth Exit Interviews: _____
4. Completion of the PbS Administrative Form for all of the distinct program data: _____
5. Number of youths released since the end of the previous data collection period: _____
6. For Corrections Only: Of the number of youths released since the end of the previous data collection period, how many were lateral transfers: _____
7. Number of youths released during the current data collection period: _____
8. Number of youths released during the month prior to the current data collection period: _____
9. The average length of stay (in days) for youth released since the last collection period: _____
10. The number of idle waking hours youths spend in rooms or dormitories during an average 16 hour day: _____
11. Number of attorney visits during the data collection period: _____





12. Number of grievance reports or complaints filed by youths during the data collection period: _____
13. Number of community volunteers providing programming in the program: _____
14. Number of programs using volunteers: _____
15. Total number of existing programs in this specific program: _____
16. Number of visits received from family and community members during the data collection period: _____
17. Total number of possible visitation hours per week (for an average youth): _____
18. If the program has a level system, what are the total number of possible levels that can be achieved by youths: _____
19. The number of new staff that began work in this program in the last six months: _____
20. Number of staff that left the program (e.g. transferred, quit, laid off, fired) in the last six months: _____
21. Total number of grievance reports or complaints filed by staff during the data collection period: _____
22. Total number of confirmed cases of abuse or neglect of youths by facility staff in the last six months: _____
23. Total number of incidents of staff members subjected to administrative sanctions directly related to the treatment of youth (e.g. suspension, demotion, letter of reprimand, etc.) in the last six months: _____



Appendix B

PbS Website Requirements

Basic PC requirements:

Uninterrupted internet access

- A DSL or Broadband connection is recommended for best performance

Internet Browser Compatibility

- Internet Explorer 6 or higher
- Also compatible with Mozilla Firefox, Apple Safari and other popular browsers
- Not intended for use on mobile devices



Email access

- A valid email address is required for accessing the PbS website.

Adobe Reader

- Many resources will require the use of Adobe Reader to download and view PDF files. Most files from PbS are compatible with version 6.0 or higher. Adobe Reader is free to download at www.adobe.com

Advanced Requirements

It is suggested you contact your computer or network administrator to discuss these advanced settings prior to performing your first data collection.

Email access

- Users must be allowed permission to send and receive emails from outside the agency. Email communications must be allowed from the following domains
 - mail.pbstandards.org
 - pbstandards.org
 - cjca.net
 - cbstandards.org
- It is also important to set these domains as safe senders to ensure that communications do not end up delayed by SPAM or Junk Email filters.

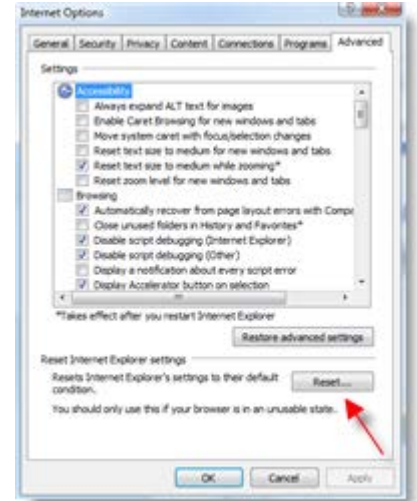
Internet Browser Compatibility

- **Important!** Javascript must be enabled in order for the website to function in your browser!
- Javascript and AJAX requests are generally enabled in your browsers default settings. We have found that restoring these default settings has been the most successful method of ensuring your browser will display the website correctly.





1. In internet explorer go to the tools menu and choose internet options
 2. Go to the Security tab
 3. Set the security level for this zone to "Medium-high" or lower
 4. Go to the advanced tab
 5. Under the heading "Reset Internet Explorer Settings" click the Reset button. (see picture)
 6. Click Apply and then OK
- If restoring these settings does not work you may need to contact a network administrator to make sure that agency firewalls are not preventing any of the following items
 - For Internet Explorer 6 settings the following must be enabled
 - Binary and script behaviors
 - Run ActiveX controls and plug-ins
 - Script ActiveX controls marked safe for scripting
 - For Internet Explorer 7 all the above settings must be true plus
 - Native XMLHTTP support



Appendix C

Role of the State/Agency Coordinator

PbS state/agency coordinators are the designated leaders of PbS in local jurisdictions, serving as the liaison connecting PbS to daily program operations, staff, youths and families as well as to agency directors. PbS state coordinators are the champions for improvements and reforms; they motivate their colleagues to continually measure and monitor the impact they have on facility culture and effectiveness of services and they model PbS' commitment to treating all youths in custody as one of our own. Successful integration of PbS into facility and agency operations requires PbS state coordinators to carry out the following responsibilities:

1. Communicate PbS Information;
2. Create and support the PbS team(s);
3. Manage and monitor the PbS data collection process and report analysis;
4. Oversee and guide the PbS improvement planning process;
5. Provide training and technical assistance;
6. Participate in PbS trainings and PbS coach visits; and
7. Coordinate community-based programs as applicable.

As one veteran PbS state coordinator explained: "My job was to be sure everything my boss said was true."

1. Communicate PbS Information

PbS state/agency coordinators communicate PbS information to all relevant individuals and/or organizations including agency leaders, supervisors, managers, facility and program leaders, line staff, youths, families, legislators and the public. State/agency coordinators also share local news, media coverage and pertinent information with PbS. The goals for the state coordinator's communications are to:

- Educate new leaders and staff about PbS;
- Prepare site coordinators and participants for the data collection, notifying them of any changes to PbS and reviewing the timeline;





- Report improvements, areas of concern and recommendations to the agency and facility leadership team and director;
- Provide PbS information for strategic planning, annual agency reports and reports to legislatures as needed;
- Share PbS news, blogs, tweets and pictures with participants; and
- Share local news, blogs, tweets and pictures with PbS.

2. Create and support the PbS Team(s)

PbS state/agency coordinators create PbS teams at each facility and at the agency level that include representatives from all areas of operations. Once created, state coordinators support the teams in the development of shared goals and approaches to improving programs, services and outcomes for youths, staff and families. More specifically, PbS state/agency coordinators:

- Build team membership to reflect the full array of services provided and operations;
- Motivate and create buy-in for team members; and
- Meet with team regularly and offer input into the agenda.

3. Manage and monitor the PbS data collection process and report analysis

PbS state/agency coordinators are responsible for ensuring each data collection cycle meets PbS' requirements for comprehensive and accurate reporting. PbS state/agency coordinators serve as the data quality gate-keepers, ensuring PbS definitions are met, PbS surveys are administered properly and submitted fully complete. PbS state/agency coordinators maintain constant communications with agency and facility leaders, staff and assigned coach in order to:

- Ensure the highest quality data is reported to PbS and reported consistently;
- Report to PbS any concerns about a participating site's data quality;
- Coordinate the analysis and presentation of outcome and summary reports to agency and facility leaders and staff with PbS coach;
- Encourage sharing of PbS data with leaders, supporting larger agency initiatives such as strategic planning and to recognize successes;
- Work with the PbS coach on issues flagged in reports and identify areas to possibly target for improvement planning; and
- Maintain data confidentiality and compliance with the PbS privacy policy.

4. Oversee and guide the PbS improvement planning process

PbS state/agency coordinators support the PbS team during all steps of the PbS improvement model and have a unique role guiding participants to use the information to create improvements. The



improvement plans are the heart of PbS – PbS collects information so it is used to guide decisions, funding allocations, staffing ratios, services for youths, connections with families and ensure youths are better for their time in custody. PbS challenges participants to provide the best possible services, conditions and quality of life for youths and provides the improvement model so participants are able to prove that do so. As participants move into the improvement step, PbS state coordinators:

- Work with the PbS coach to identify potential areas for improvement based on the collected data and agency initiatives and strategic plans;
- Review data related to existing improvement plans;
- Work with PbS team members and agency leadership in the development of improvement and encourage the participants to share widely in the facility or program; and
- Review the online improvement plans, ensure timely, meaningful updates are made and enter required review comments.

5. Provide training and technical assistance

PbS state/agency coordinators are the local PbS experts and should be the first call or email with questions about PbS. The PbS state/agency coordinator can refer questions to the PbS Help Desk and/or PbS coach as appropriate. When a new site coordinator or agency leader is hired, the PbS state coordinators introduces him or her to PbS. Specifically, PbS state/agency coordinators:

- Provide PbS overviews as needed or requested by local participants and stakeholders;
- Answer questions about user setup, the PbS data collection process and improvement plans, referring to the PbS Help Desk and PbS coach as appropriate;
- Share training and technical assistance concerns with the PbS Help Desk and PbS coach;
- Train new members of the PbS team and agency leadership; and
- Serve as a mentor and support other PbS state coordinators and participants.

6. Participate in PbS trainings and PbS coach visits

PbS state/agency coordinators show their leadership as the local PbS liaison by participating in PbS trainings and joining the PbS coach when visiting participants. The time spent in the trainings and on visits also is intended to deepen the PbS state/agency coordinator's knowledge of PbS and confidence as PbS' liaison. PbS state/agency coordinators are required to participate in:

- Annual PbS State/Agency Coordinators Training;
- PbS Distance Learning Webinars (DLWs) and on-line trainings and share information learned with local PbS team members;
- Coordinating and attending site visits with the PbS coach including meetings, data reviews, report analysis and improvement plan development; and



- Facility and agency exit meetings.

7. Coordinate community-based programs

In addition to correction, detention and assessment facilities, PbS state/agency coordinators oversee all community-based residential programs that participate in PbS for community programs. PbS state coordinators who oversee participation of community-based programs serve more like PbS coaches with added responsibilities such as conducting site visits and guiding improvement planning. PbS state/agency coordinators with community-based programs:

- Fulfill the responsibilities listed above;
- Coordinate and attend site visits annually including meetings, data reviews, report analysis and improvement plan development for each program;
- Complete a Post-Data Collection Review with each of the community-based participants following both data collection cycles and submit the reviews to the PbS Help Desk and PbS coach;
- Coordinate conference calls with the PbS coach as needed, not fewer than once per data collection period; and
- Share concerns, successes and suggestions for working with community-based programs with the PbS Help Desk and PbS coach.



Appendix D

Role of the Facility or Program Administrator

PbS facility or program administrators lead and support PbS participation to ensure the PbS program is properly implemented and integrated throughout facility operations. PbS facility or program administrators promote PbS and continuous improvement through effective communication among all facility departments and engaging the PbS team. PbS facility or program administrators undertake the following responsibilities:

1. Communicate PbS information;
2. Create the PbS Team;
3. Monitor the PbS data collection process and report analysis;
4. Oversee and guide the PbS improvement planning process;
5. Assist in training and technical assistance; and
6. Participate in PbS trainings and PbS coach visits.

1. Communicate PbS information

- Connect with state and site coordinator to prepare for the data collection, reviewing notable changes or updates;
- Share and discuss improvements, areas of concern and recommendations with the PbS team and other relevant managers;
- Provide PbS information for strategic planning, annual agency reports and reports to legislatures as needed;
- Ensure PbS updates are discussed in relevant meetings with staff, residents, other relevant managers and stakeholders;
- Share PbS news, blogs, tweets and pictures with participants; and
- Share local news, blogs, tweets and pictures with PbS.



2. Create the PbS Team

- Assist the site coordinator with establishing a PbS team for the facility that is representative of all facility program areas (cottage/unit, security, social services, mental health, medical, education, recreation, administration, etc.);
- Work with the state coordinator to assign a qualified site coordinator and alternate site coordinator to facilitate the team;
- Approve facility staff that should have access to the PbS website;
- Motivate and create buy-in for team members; and
- Connect with site coordinator to create an agenda and schedule PbS team meetings regularly.

3. Monitor the PbS data collection process and report analysis

- Coordinate with site coordinator and PbS team to verify the highest quality data is reported to PbS and reported consistently;
- Participate in monitoring the facility's data during each draft period to maximize consistency and ensure that the facility has adhered to PbS definitions and all data has been recorded;
- Respond to any concerns about the facility's data quality;
- Work with site coordinator to analyze results of the data collections and present findings to the PbS team;
- Help coordinate the analysis and presentation of outcome and summary reports with state coordinator to agency, facility leaders and PbS coach by providing data and necessary information;
- Work with the PbS coach and site coordinator on issues flagged in reports and identify areas to target for improvement planning; and
- Ensure data confidentiality and compliance with the PbS privacy policy.

4. Oversee and guide the PbS improvement planning process

- Keep the improvement process in the forefront by ensuring review of incident reports, interim data and survey results;
- Work with the PbS coach and site coordinator to identify potential areas for improvement based on the collected data and agency initiatives and strategic plans;
- Review data related to existing improvement plans;
- Ensure timely, meaningful updates are made and enter required review comments;



- Work with PbS team members and agency leadership in the development of improvement and guide implementation of the facility improvement plan in the facility;
- Communicate the improvement plan throughout the facility to engage and involve all staff in the relevant action steps; and
- Ensure approval of plans from agency management if required.

5. Assist in training and technical assistance

- Present PbS to management team and staff;
- Answer questions about user setup, the PbS data collection process and improvement plans, referring to the PbS Help Desk and PbS coach as appropriate;
- Share training and technical assistance concerns with the PbS Help Desk and PbS coach;
- Assist in training new members of the PbS team and agency leadership; and
- Serve as a mentor and support for team and staff.

6. Participate in PbS trainings and PbS coach visits

- Participate and include all available PbS team members in the PbS Distance Learning Webinars (DLWs) and on-line trainings and share information learned with administration and PbS team members;
- Coordinate and attend site visits with the PbS coach including meetings, data reviews, report analysis and improvement plan development; and
- Participate in facility exit meetings.



Appendix E

Role of the Site Coordinator

PbS site coordinators lead the PbS team and improvement effort in juvenile facilities to ensure the PbS program is properly implemented and integrated throughout facility operations. The site coordinator coordinates all aspects of PbS and works with the facility administrator, state coordinator and PbS coach to promote PbS and continuous improvement. PbS site coordinators undertake the following responsibilities:

1. Communicate PbS information;
2. Lead the PbS Team;
3. Guide and facilitate the PbS data collection process and report analysis;
4. Manage the PbS improvement planning process;
5. Provide training and technical assistance; and
6. Participate in PbS trainings and PbS coach visits.

1. Communicate PbS information

- Educate management team and new staff about PbS;
- Connect with the facility administrator and state coordinator to prepare for the data collection, reviewing notable changes or updates;
- Share and discuss improvements, areas of concern and recommendations to the PbS team;
- Provide PbS information for strategic planning, annual agency reports and reports to legislatures as needed;
- Share PbS news, blogs, tweets and pictures with participants; and
- Share local news, blogs, tweets and pictures with PbS.

2. Lead the PbS Team

- Assist in creating a PbS team for the facility that will reflect the full array of services provided and operations (cottage/unit, security, social services, mental health, medical, education, recreation, administration, etc.);
- Approve facility staff that should have access to the PbS website;



- Motivate and create buy-in for team members; and
- Coordinate with the facility administrator to create an agenda and schedule PbS team meetings regularly.

3. Guide and facilitate the PbS data collection process and report analysis

- Coordinate with the facility administrator, state coordinator and PbS team to verify the highest quality data is reported to PbS and reported consistently;
- Monitor the facility's data during each draft period to maximize consistency and ensure that the facility has adhered to PbS definitions and all data has been recorded;
- Respond to any concerns about the facility's data quality;
- Work with the facility administrator, state coordinator and PbS coach to analyze results of the data collections and discuss findings with the PbS team;
- Help coordinate the analysis and presentation of outcome and summary reports with state coordinator and facility administrator to agency, facility leaders by providing data and relevant information as requested;
- Work with the facility administrator and PbS coach on issues flagged in reports and identify areas to target for improvement planning to communicate to PbS team; and
- Ensure data confidentiality and compliance with the PbS privacy policy.

4. Manage the PbS improvement planning process

- Work with the facility administrator, PbS team, state coordinator and PbS coach to identify areas for improvement based on the PbS data, agency and facility initiatives and strategic plans;
- Work with PbS team members and facility leadership in the development of improvement and guide implementation of the facility improvement plan in the facility;
- Review data related to existing improvement plans with the PbS team, including interim data to identify trends and progress;
- Ensure timely, meaningful updates are made and enter required review comments;
- Communicate the improvement plan throughout the facility to engage and involve all staff in the relevant action steps; and
- Ensure approval of plans from agency management, if required.





5. Provide training and technical assistance

- Present PbS to management team and staff;
- Answer questions about user setup, the PbS data collection process and improvement plans, referring to the PbS Help Desk and PbS coach as appropriate;
- Share training and technical assistance concerns with the PbS Help Desk and PbS coach;
- Assist in training new members of the PbS team and agency leadership; and
- Serve as a mentor and support for team and staff.

6. Participate in PbS trainings and PbS coach visits

- Participate and include all available PbS team members in the PbS Distance Learning Webinars (DLWs) and on-line trainings and share information learned with administration and PbS team members;
- Coordinate and attend site visits with the PbS coach including meetings, data reviews, report analysis and improvement plan development; and
- Participate in facility exit meetings.

