

National Association
for Behavioral Intervention
and Threat Assessment

NABITA Industry Standards for Behavioral Interventions Teams **Assessment Tool**

The NABITA Industry Standards for Behavioral Intervention Teams Assessment Tool is provided as a complement to the 2023 NABITA Industry Standards for Behavioral Intervention Teams (BITs). BITs can use the to assess their execution of each of NABITA's 21 standards to highlight successes and identify opportunities for improvement. The tool includes statements identifying evidence of meeting each standard and an associated points value. Each standard has a suggested list of materials to assist in gathering evidence for an assessment.

INSTRUCTIONS

Teams will score themselves on each standard by totaling up points earned for each substandard.

Teams will score in a performance level either Deficient, Needs Improvement, Proficient, or Exemplary based on points earned.

Unless the score reaches the full value of the next level, the team should classify themselves in the lower range. For example, if a score of 2.5 is earned and the range for Needs Improvement is 3-5, the scoring would be classified as Deficient.

The total of all standards combined places teams into one of four overall performance levels: Deficient, Needs Improvement, Proficient, or Exemplary.



PART 1

STRUCTURAL ELEMENTS

Standard 1
TEAM AUTHORITY AND SCOPE

Standard 2
PREVENTION VS. THREAT ASSESSMENT

Standard 3
TEAM NAME

Standard 4
TEAM LEADERSHIP

Standard 5
TEAM MEMBERSHIP

Standard 6
TEAM TRAINING

Standard 7
INFORMATION SHARING

Standard 8
TEAM BUDGET

Standard 9
COMMUNITY EDUCATION AND MARKETING

Standard 10
PROCEDURE MANUAL

Standard 1 Team Authority and Scope

Evidence to review: Institutional policies, procedure manual, team mission and scope, website

___ Behavioral Intervention Teams are small groups of school officials who meet regularly to collect and review information about at-risk community members and develop intervention plans to assist them. **(N/A points)**

___ The team's mission statement balances supporting the needs of the individual with the safety of the community. **(1 point)**

___ The team's mission statement outlines the team's commitment to addressing the spectrum of risk, including early intervention as well as violence risk assessment. **(1 point)**

___ The team's mission statement is connected to the academic mission of the institution. **(1 point)**

___ The team addresses behavior that occurs on and off campus for current students, faculty, and staff. **(1 point)**

___ The team addresses behaviors that are connected to the institution for alumni, visitors, parents, or others. **(1 point)**

___ A written institutional policy establishes and authorizes the team, setting its mission, membership, and scope. **(1 point)**

___ Institutional policy guides the team and outlines the team's authority to engage in the three main functions of BITs:

- ___ Gather Data **(1 point)**
- ___ Assess Risk **(1 point)**
- ___ Deploy Interventions **(1 point)**

___ The institutional policy guiding the BIT is publicly accessible. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 2 Prevention vs. Threat Assessment

Institutions have one integrated team that addresses early intervention cases as well as threat assessment cases.

Evidence to review: Team mission and scope, procedure manual, marketing material, reporting and data analysis

___ The institution has one team that receives referrals and addresses behaviors along the spectrum of risk to ease distress, increase wellness, and/or reduce or prevent violence. **(5 points)** – *if the team does not score on this item, they cannot be proficient or exemplary regardless of the sum of other points.*

___ Other teams with overlapping roles and responsibilities do not exist within the institution. **(1 points)**

___ The team receives referrals and addresses lower-risk concerns including, but not limited to, disruptive or concerning behaviors; difficulty accessing resources; academic distress; or personal, emotional, and/or psychological difficulties. **(2 points)**

___ The team incorporates violence risk and threat assessment into its work by receiving and addressing higher-risk referrals including, but not limited to, harm to self or others. **(2 points)**

___ The team avoids establishing a minimum threshold for referred behaviors (e.g., "That does not rise to the level of the BIT"). **(1 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient *(unable to score as proficient if operating more than one team)*
9 – 10 = Exemplary *(unable to score as exemplary if operating more than one team)*

Standard 3 Team Name

The team's name accurately communicates the function of the team within the context of the institutional community.

Evidence to review: Team name, marketing materials, perception surveys

___ The team has an established name. **(1 point)**

___ The team's name resonates with the unique institutional climate and community in a way that garners buy-in from the community. **(2 points)**

___ The team's name:

- ___ Communicates the role and function so that students, faculty, and staff can understand the purpose of the team **(1 point)**
- ___ Is distinct from other teams that may exist at the school or institution **(1 point)**
- ___ Encourages members of the community to report all concerning behavior **(1 point)**
- ___ Avoids sending the message that the team is punitive, limited in scope, and/or focused on a specific type of behavior or concern (e.g., only high-level cases) **(1 point)**
- ___ Conveys the importance of the team's mission and oversight, especially to those unfamiliar with the work of the team (**1 point)**
- ___ Avoids acronyms that undercut the seriousness of the team's work **(1 point)**
- ___ Avoid acronyms that convey a negative connotation of any kind (e.g., Risk Assessment Team – R.A.T.). **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary



Standard 4 Team Leadership

The team chair brings the team together and keeps discussions productive and focused while maintaining a long-term view of team development and education.

Evidence to review: procedure manual, team training schedule, meeting agendas, member feedback

- ___ The team has one person who serves as the permanent (non-rotating) team chair. **(2 points)**
- ___ The team chair has institutional authority to lead the team. **(2 points)**
- ___ The team chair has working knowledge of the team's cases. **(1 point)**
- ___ The team chair is familiar with relevant education and disability laws. **(1 point)**
- ___ The team chair has the time required to dedicate to the role. **(2 points)**
- ___ The team chair does not have conflicting roles or limits on information sharing. **(1 point)**
- ___ The team chair meets regularly (e.g., semesterly, annually) with individual BIT members to formally or informally supervise members related to their BIT responsibilities. **(1 point)**
- ___ The team chair facilitates the operational and process functions of the team including, but not limited to:
    - ___ Updating the policy and procedure manual **(1 point)**
    - ___ Coordinating team training **(1 point)**
    - ___ Convening meetings and setting meeting agendas **(1 point)**
    - ___ Assuring compliance with team protocol(s) **(1 point)**
    - ___ Gathering data **(1 point)**
    - ___ Leading risk analysis efforts **(1 point)**
    - ___ Assessing team effectiveness **(1 point)**
    - ___ Orchestrating the deployment of interventions **(1 point)**

- The team chair engages in efforts to increase team efficacy (e.g., annual goal setting, effective communication training). **(1 point)**
- The team chair considers long-term planning that aligns with both the team's and the institution's strategic mission/objectives. **(1 point)**

Total possible points: 20

Total Score: _____

Score Ranges:
0 – 5 = Deficient
6 – 10 = Needs Improvement
11 – 15 = Proficient
16 – 20 = Exemplary



Standard 5 Team Membership

The team is comprised of at least five, but no more than ten, designated school officials.

Evidence to review: procedure manual, membership list and expectations, position descriptions, team training, institutional data

- ___ The number of standing members ranges between five and ten. **(1 point)**
- ___ The following areas have a standing team member and a trained back-up member:
  - ___ Dean of Students (or designee) or Vice President for Student Affairs (or designee) **(.25 point)**
  - ___ Mental health/counseling employee; **(.25 point)**
  - ___ Student Conduct **(.25 point)**
  - ___ Institutional Security or Institutional Law Enforcement. **(.25 point)**
- ___ Team membership is representative of institutional needs and resources. **(1 point)**
- ___ When adding members, the team focuses on adding departmental representation that may provide information, resources, or expertise enabling the team to be its most effective. **(1 point)**
- ___ The team has a roster of as-needed members (e.g., veterans services staff member, Title IX Coordinator, international programs staff member), in addition to the standing members above. **(1 point)**
- ___ As-needed members attend team meetings when they have helpful information or insight on a case. **(1 point)**
- ___ Team membership does not include undergraduate students. Graduate students are only included in the team membership if appropriate as the result of an applicable employment role. **(1 point)**
- ___ To reduce BIT bias(es) and enhance cultural competence, the team includes members who represent the diverse identities of the institutional community. **(1 points)**

- ___ Team members prioritize BIT meetings by:
  - ___ Adjusting calendars as necessary **(.25 point)**
  - ___ Attending meetings as needed **(.25 point)**
  - ___ Reviewing meeting agendas in advance **(.25 point)**
  - ___ Preparing to participate in the meeting in advance **(.25 point)**
- ___ Team members' job descriptions include their responsibilities as official members of the BIT and account for the time necessary to serve on the team. **(1 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary



Standard 6 Team Training

Team members engage in regular, ongoing BIT training to increase confidence, build competence, and foster team development.

Evidence to review: team training schedule, training content, procedure manual

___ The team chair creates an annual professional development schedule for team members, which can include conferences, workshops, webinars, articles, books, tabletop exercises, and other training opportunities. **(2 points)**

___ Each member engages in annual professional development in the competency areas including, but not limited to, risk and threat assessment, mental health, cultural awareness, bias mitigation, intra-team communications, FERPA (Family Educational Rights and Privacy Act) compliance, recordkeeping, intervention techniques, recognizing leakage, empowering a culture of reporting, relevant education and disability laws, and institutional/community engagement. **(2 points)**

___ A BIT leader or experienced designee trains new members, or enrolls new members in training, on:

- ___ BIT tools **(2 points)**
- ___ Electronic recordkeeping system(s) **(2 points)**
- ___ Policies, processes, and protocol(s) **(2 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 7 Information Sharing

Team members share information according to BIT standard operating procedures and comply with FERPA/privacy/confidentiality requirements (as applicable) when accessing and sharing information.

Evidence to review: team training related to information sharing and team dynamics, procedure manual, institutional information sharing policy

___ Members understand that FERPA governs the team's information sharing with relation to student records. **(1 point)**

___ The team outlines information sharing guidelines (e.g., FERPA internal and external exceptions) in its standard operating procedures. **(1 point)**

___ The team complies with a written policy and training for team members on all applicable privacy and confidentiality standards. **(1 point)**

___ Team members are forthcoming with information, as FERPA permits, and:

- ___ Promote holistic discussion **(1 point)**
- ___ Dismantle information silos **(1 point)**
- ___ Provide a variety of perspectives **(1 point)**

___ Team members with privileged relationships, such as mental health counselors, share information only as allowed by applicable state law and/or professional ethical standards. **(1 point)**

___ Conversations between team members are candid. **(1 point)**

___ Conversations between team members are respectful. **(1 point)**

___ Team members are mindful to refrain from letting supervisory or positional power impede the team's discussion of individual cases. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 8 Team Budget

The team has an established budget sufficient to meet these standards, the ongoing needs of the team, and the community it serves.

Evidence to review: procedure manual, financial information

___ The team has an annual budget allocation either through a designated budget line or shared funding across departments represented on the team. **(5 points)**

___ Funding supports but is not limited to:

- ___ Ongoing training and professional development; **(1.25 point)**
- ___ Community education and marketing; **(1.25 point)**
- ___ Electronic recordkeeping; and **(1.25 point)**
- ___ Consultation and/or assessment services. **(1.25 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary





Standard 9 Community Education and Marketing

The team educates its community about bystander engagement, recognizing leakage, and making referrals. The team markets its function/services through advertising campaigns, websites, logos, and other promotional materials.

Evidence to review: examples of marketing and advertising efforts, written strategic marketing plan, BIT operations manual, perception surveys

- ___ The team trains its community to recognize concerning behaviors along the full spectrum of risk. **(1 point)**
- ___ The team instills a sense of shared responsibility for institutional safety, and the need to share concerns and help the BIT connect the dots as it evaluates cases in the community-at-large. **(1 point)**
- ___ The team educates the community on how to make a referral to the team using a centralized reporting system. **(1 point)**
- ___ The team trains key stakeholders on the team protocols, mission, and scope to increase confidence, trust, and buy-in from key referral sources. **(1 point)**
- ___ The team educates and trains its community on cultural competency related to BIT referrals to help mitigate bias. **(1 point)**
- ___ The team uses active (e. g., lecture style conversations with department heads and orientation programs) strategies in its ongoing education and marketing efforts. **(0.5 points)**
- ___ The team uses passive (e. g., website, brochures, signage, videos) strategies in its ongoing education and marketing efforts. **(0.5 points)**
- ___ The team has a strategic marketing plan. **(1 point)**

- ___ The strategic marketing plan outlines the:
  - ___ Audience (e.g., who should be referring to the BIT) for each product **(0.25 points)**
  - ___ Content (e.g., what the specific audience needs to know) for each product **(0.25 points)**
  - ___ Format (e.g., time, place, medium) for each product **(0.25 points)**
  - ___ Buy-in strategies (e.g., giveaway, knowledge) for each product **(0.25 points)**
- ___ The team adapts education and marketing efforts to specific audiences including students, faculty/staff, parents, individual departments (e.g., residence life, law enforcement/safety, etc.). **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary



Standard 10 Procedure Manual

The team has a written procedure manual that supports an objective, consistent, and evidence-based functionality.

Evidence to review: procedure manual

___ The written procedure manual is formalized (e.g., finalized and approved by appropriate party). **(5 points)** – *if the team does not score on this item, they cannot be proficient or exemplary regardless of the sum of other points.*

___ The manual is organized, consistent, and thorough. **(1 point)**

___ The procedure manual is accessible to all team members. **(1 point)**

___ The team has a formalized process and review the procedure manual annually to reflect updates that result from changes in team processes, institutional policy, and any applicable federal or state laws. **(1 point)**

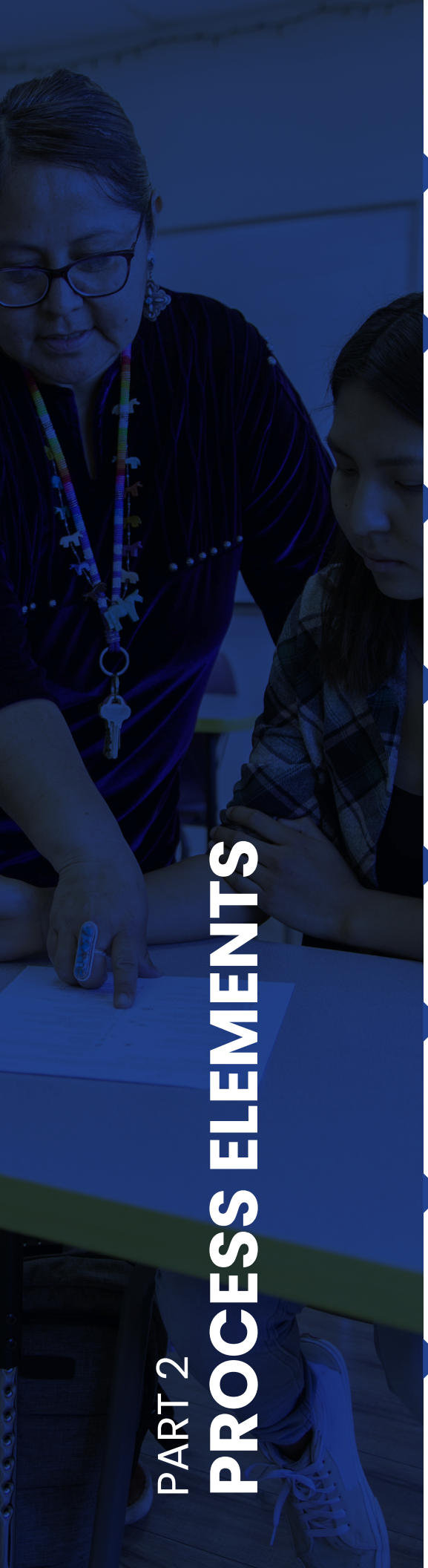
___ The procedure manual includes:

- ___ An outline of the team structure (e.g., membership) **(0.40 points)**
- ___ Guidelines for team meetings (e.g., meeting frequency, agenda use) **(.40 points)**
- ___ How the team operationalizes each standard of practice for a BIT; **(0.40 points)**
- ___ The team's referral response process (e.g., gather data, assess, intervene) **(0.40 points)**
- ___ How the team monitors progress toward its goals (e.g., strategic plan, assessment, data collection) **(0.40 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient *(unable to score as proficient if written manual is not formalized)*
9 – 10 = Exemplary *(unable to score as exemplary if written procedure manual is not formalized)*



PART 2

PROCESS ELEMENTS

Standard 11
REFERRAL RECEIPT AND REVIEW

Standard 12
MEETING OPERATIONS

Standard 13
OBJECTIVE RISK RUBRIC

Standard 14
PSYCHOLOGICAL, THREAT, AND VIOLENCE RISK ASSESSMENTS

Standard 15
INTERVENTIONS

Standard 16
CASE MANAGEMENT

Standard 17
CASE REVIEW

Standard 18
RECORDKEEPING



Standard 11 Referral Receipt and Review

The team has a process for receiving, reviewing, and triaging all referrals.

Evidence to review: website, team training information, procedure manual, recordkeeping system

___ The team has a centralized, publicly available system for receiving referrals (e.g., electronic referral form). **(2 points)**

___ The team documents all BIT referrals, including those initially received by phone, email, in person communication, etc., through a centralized system. **(2 points)**

___ After a referral has been made, the referrer receives an acknowledgment message from the BIT. **(1 point)**

___ A designated staff or team member reviews referrals each workday. **(1 point)**

___ The team has guidelines for determining the need for action prior to the team meeting (e.g., assigning case, calling an emergency team meeting, welfare checks). **(1 point)**

___ The team allows anonymous referrals and provides guidance regarding the limitations of anonymity in the process. **(1 point)**

___ The team has a designated process for obtaining additional information from referral sources when needed. **(1 point)**

___ The team provides updates, as appropriate, to referral sources as permitted by law (e.g., FERPA) and protocols, through standardized, as well as personalized, communications. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 12 Meeting Operations

The team holds meetings at regular intervals, following an agenda and established process for facilitating team meetings.

Evidence to review: Meeting schedule, agendas, team training information, procedure manual, pattern analysis of meetings

- ___ The team meets regularly, no less than every other week. **(2 points)**
- ___ The team has a protocol for calling an emergency meeting to discuss urgent issues. **(1 point)**
- ___ An agenda, outlining the meeting and individuals the BIT will discuss, is available to team members in advance of the meeting. **(1 point)**
- ___ Case discussions during team meetings consistently follow the three-phase process:
  - ___ Gathering data from the referral and team members **(2 points)**
  - ___ Assessing the data using objective risk rubrics **(2 points)**
  - ___ Deploying interventions based on the level of risk **(2 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 13 Objective Risk Rubric

The team uses an evidence-based, objective risk rubric to assess every referral.

Evidence to review: risk rubric, case notes with risk ratings, pattern analysis of risk ratings, team training documentation, procedure manual

___ Following the information gathering phase, **the team** applies an objective risk rubric to ***every*** referral. **(5 points)** – *if the team does not score on this item, they cannot be proficient or exemplary regardless of the sum of other points.*

___ The team uses the risk rubric to review and assess a range of behaviors and concerns including, but not limited to, emotional health concerns, adjustment difficulties, threatening or aggressive behavior, and threats to self or others. **(1 point)**

___ The BIT assigns an initial risk rating to each case. **(1 point)**

___ The BIT updates the risk rating as the BIT gathers additional data (e.g., reassess the individual's risk level at subsequent meetings once information is gathered during the intervention phase). **(1 point)**

___ The BIT documents all risk ratings in an electronic record, including a rationale for the risk level assigned. **(1 point)**

___ The team considers multiple perspectives when assessing risk to actively mitigate bias in the assessment process. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient *(unable to score as proficient if the team is not applying an objective risk rubric to every referral)*
9 – 10 = Exemplary *(unable to score as exemplary if the team is not applying an objective risk rubric to every referral)*

Standard 14 Psychological, Threat, and Violence Risk Assessments

The team uses objective, evidence-based tools to conduct violence risk, threat, and psychological assessments as part of its overall approach to prevention and intervention.

Evidence to review: risk assessment tools, case notes with risk assessments, team trainings, procedure manual

___ The team has an established threshold within its objective risk rubric for a mandated assessment (e.g., Elevated or Critical on the NABITA Risk Rubric). **(1 point)**

___ The team has formalized procedures to determine when, how, and who will conduct mandated assessments. **(5 points)** – *if the team does not score on this item, they cannot be proficient or exemplary regardless of the sum of other points.*

___ The team defines violence risk assessments as non-clinical, objective assessments designed to better understand the holistic elements that influence an individual's likelihood of violence or harm to others. The team uses violence risk assessments (e.g., SIVRA-35) to identify the risk factors that may increase an individual's likelihood of violence or dangerousness toward a person, group, or system, as well as the protective factors that may mitigate that risk. **(1 point)**

___ The team uses threat assessments to establish immediate safety by assessing the credibility or actionability of a specific threat of harm to self or others. **(1 point)**

___ The team defines a psychological assessment (e.g., mental health evaluation) as an assessment by a clinical provider evaluating an individual's mental health status/diagnosis and appropriate treatment options (e.g., medication, therapeutic modality, hospitalization). The team uses psychological assessments when they are focused on determining a mental health diagnosis and appropriate treatment options. **(1 point)**

___ At a minimum, the team trains three to five members on proper usage of an objective, evidence-based tool for conducting violence risk assessments (or) the team maintains an established relationship with a trained external provider(s) to conduct a structured risk assessment as needed, including in urgent circumstances. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient *(unable to score as proficient if the team does not have formalized procedures to determine when, how, and who will conduct mandated assessments)*
9 – 10 = Exemplary *(unable to score as exemplary if the team does not have formalized procedures to determine when, how, and who will conduct mandated assessments)*

Standard 15 Interventions

The team clearly defines its actions and interventions for each risk level on the BIT's objective risk rubric.

> **Evidence to review:** list of interventions/action items, risk rubric, case notes with risk ratings and interventions, pattern analysis of interventions, procedure manual, team training related to interventions

- After assessing risk, using an objective risk rubric, the team chooses interventions that are tailored to:
  - The risk level **(2.5 points)** – *if the team does not score on these items, they cannot be proficient or exemplary regardless of the sum of other points.*
  - The individual **(2.5 points)** – *if the team does not score on these items, they cannot be proficient or exemplary regardless of the sum of other points.*
- The team clearly defines the range of available interventions, including but not limited to, case management, referral to support resources, parental/guardian notification, welfare or safety checks, and mandated assessments. **(1 point)**
- The duration and frequency of the interventions aligns with the level of risk and responds to the individual's presenting concerns. **(1 point)**



- ___ The team does not have direct disciplinary authority and does not make determinations about interim actions, sanctions, or other disciplinary actions (e.g., suspensions, holds, involuntary withdrawal, or access restrictions). **(1 point)**
- ___ The team does not require compliance with recommended interventions. **(1 point)**
- ___ Interventions are:
  - ___ Culturally responsive **(.25 points)**
  - ___ Non-discriminatory (in intent and impact) **(.25 points)**
  - ___ Non-stigmatizing related to mental health concerns or disability **(.25 points)**
  - ___ Inclusive in nature. **(.25 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient *(unable to score as proficient if interventions are not tailored to the risk level and the individual)*
9 – 10 = Exemplary *(unable to score as exemplary if interventions are not tailored to the risk level and the individual)*

Standard 16 Case Management

The team invests in case management as a process, often as a role/position, that provides flexible, need-based support for individuals to address referral concerns, connect with resources, and improve overall wellness.

> **Evidence to review:** case manager position description, team trainings related to case management, case record analysis and accuracy, procedure manual, NABITA Standards for Case Management

___ A team member, or staff member, is assigned to each case to execute and document follow-up tasks and interventions to their assigned referrals. **(2 points)**

___ When assigning an individual to serve as a case manager, the team considers who is best equipped considering their relationship to the individual, the staff member's area of expertise, and the capacity of the staff member to work with the individual. **(1 point)**

___ The team's case management practices (e.g., intake appointments, risk assessments, action planning) are formalized and written. **(2 points)**

___ Case management services, both those offered by a formal case manager and those delivered by other team members, align with the NABITA Standards for Case Management. **(5 points)** – *if the team does not score on this item, they cannot be proficient or exemplary regardless of the sum of other points.*

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient *(unable to score as proficient if case management services/processes are not aligned with the NABITA Standards for Case Management)*
9 – 10 = Exemplary *(unable to score as exemplary if case management services/procesess are not aligned with the NABITA Standards for Case Management)*

Standard 17 Case Review

The team regularly uses a written and formalized case review protocol to determine and document the need to keep a case active, to engage in case monitoring, or to move a case to inactive/closed status.

Evidence to review: case record analysis and accuracy, database reports, procedure manual

___ The team has a written, formalized process to determine case status (e.g., open, closed/inactive, monitoring status). **(3 points)**

___ The team's protocol for determining case status relies on an objective assessment of risk and not on speculation, assumption, and/or subjective evaluations. **(3 points)**

___ The team articulates, in the procedure manual, the frequency with which the team reviews cases (e.g., weekly, bi-weekly, monthly). **(1 point)**

___ When the team moves a case from active status to monitoring status, the team outlines a monitoring plan. **(2 points)**

___ The team moves a case in monitoring status back to active status if new risk emerges. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 18 Recordkeeping

The team uses an electronic data management system to keep records of all referrals and cases.

Evidence to review: case record analysis and accuracy, system capabilities and usage, data reports

- ___ The team tracks referrals in an electronic database. **(1 point)**
- ___ Case records contain all relevant referral information (e.g., incident summary, involved parties), including but not limited to:
  - ___ Case notes **(1 point)**
  - ___ Demographic information **(1 point)**
  - ___ Risk ratings with rationales **(1 point)**
  - ___ Interventions and follow-up notes **(1 point)**
  - ___ Case status **(1 point)**
- ___ Standing team members have full access to cases in the electronic database system, including the ability to edit and view the case. **(1 point)**
- ___ The team's documentation uses objective and descriptive language, records relevant observable behaviors, and notes direct quotations when appropriate. **(1 point)**
- ___ The team's documentation avoids using diagnostic, informal, or judgmental language. **(1 point)**
- ___ The team's documentation practices align with FERPA requirements. **(1 point)**
- ___ The team's documentation practices align with institutional policies and procedures. **(1 point)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary



PART 3

QUALITY ASSURANCE AND ASSESSMENT

Standard 19
END OF SEMESTER AND YEAR REPORTS

Standard 20
TEAM AUDIT

Standard 21
PROGRAM EFFECTIVENESS

Standard 19 End of Semester and Year Reports

The team collects data to analyze trends or patterns, publishes its findings in semester or annual reports, and adjusts resources, marketing, and/or training in accordance with its findings.

Evidence to review: audit reports, end of semester and annual reports, assessment efforts strategic planinterventions

- ___ The team has a protocol for collecting and analyzing data from its electronic recordkeeping system to report trends on a semesterly and/or annual basis. **(1 points)**
- ___ Reports identify trends in:
  - ___ Referrals **(.50 points)**
  - ___ Gaps in team training **(.50 points)**
  - ___ Education opportunities for the community **(.50 points)**
- ___ Reports are aggregated, de-identified, and available to the public. **(1 point)**
- ___ Reports include, but are not limited to:
  - ___ De-identified demographic referral source data **(.50 points)**
  - ___ De-identified demographic referred individual data **(.50 points)**
  - ___ Referral presenting issues **(.50 points)**
  - ___ Percentage of cases referred at each risk level **(.50 points)**
  - ___ Common team interventions or actions **(.50 points)**
  - ___ Team trainings **(.50 points)**

___ Team accomplishments **(.50 points)**

___ The team publishes the aggregate, de-identified reports on demographics, presenting issues, and interventions on the team's website. **(1 points)**

___ The team shares the report with key stakeholders on a regular basis. **(1 points)**

___ The team uses this data to make informed decisions about allocation of team resources. **(1 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary



Standard 20 Team Audit

The team regularly assesses its structure and processes to ensure it is functioning effectively and is in alignment with best practices.

Evidence to review: audit reports, end of semester and annual reports, assessment efforts

___ The team completes an internal or external review of the following elements every other year at a minimum:

- ___ BIT structure **(1 point)**
- ___ BIT process **(1 point)**
- ___ BIT effectiveness (e.g., risk reduction, connection to resources) **(1 point)**
- ___ Case trends **(1 point)**
- ___ Quality assurance elements (e.g., satisfaction surveys) **(1 point)**
- ___ Whether its human/staffing resources are adequate to meet the needs of the team and the community **(1 point)**
- ___ Whether its fiscal resources are adequate to meet the needs of the team and the community **(1 point)**
- ___ Whether its technology resources are adequate to meet the needs of the team and the community **(1 point)**

___ The team uses data from the team audit to inform future team planning and/or decision-making. **(2 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Standard 21 Program Effectiveness

Teams deploy various research methods to assess the team's effectiveness in meeting goals and outcomes.

Evidence to review: audit reports, end of semester and annual reports, assessment efforts, strategic plan

___ The team identifies goals and outcomes including:

- ___ Reduction of risk level **(1 point)**
- ___ Connection to resources **(1 point)**
- ___ Increase in wellness scores **(1 point)**

___ The team deploys methods (e.g., satisfaction surveys, pre-/post-surveys) to assess the team's effectiveness in achieving the identified goals and outcomes. **(2 points)**

___ The team includes the findings of its assessment efforts in its end-of-semester and/or end-of-year report. **(2 points)**

___ The team uses its assessment efforts findings to inform decision-making and to improve programming, services, team training, team resources, and community education. **(3 points)**

Total possible points: 10

Total Score: _____

Score Ranges:
0 – 2 = Deficient
3 – 5 = Needs Improvement
6 – 8 = Proficient
9 – 10 = Exemplary

Total possible points on assessment: 220

Total score of all standards: _____

Score Ranges:
0 – 55 = Deficient
56 – 110 = Needs Improvement
111 – 165 = Proficient (with three or fewer areas rated below proficient and none of the following can be below proficient: prevention vs. threat assessment, objective risk rubric, or interventions)
166 – 220 = Exemplary (with no areas rated below proficient)

Descriptions:

Deficient: BIT operations in these areas are not in alignment with standards of practice identified by NABITA and may be increasing the risks associated with these activities. For any "deficient" standards, review the resources outlined in the Team Training Template related to each of these areas or consider contacting a NABITA consultant to help plan critical improvements.

Needs Improvement: BIT operations in this area include meeting components of the BIT standards of practice, but they need additional development. For any "needs improvement" standards, review the resources outlined in the Team Training Template related to each of these areas.

Proficient: BIT operations in this area are proficient. They meet the basic standards of practice identified by NABITA. Review the standards and related resources to continue improving and developing in these areas. Create a plan of action for continuous improvement.

Exemplary: BIT operations in this area exemplify the standards of practice identified by NABITA. Focus on identifying ways to sustain this level of performance.