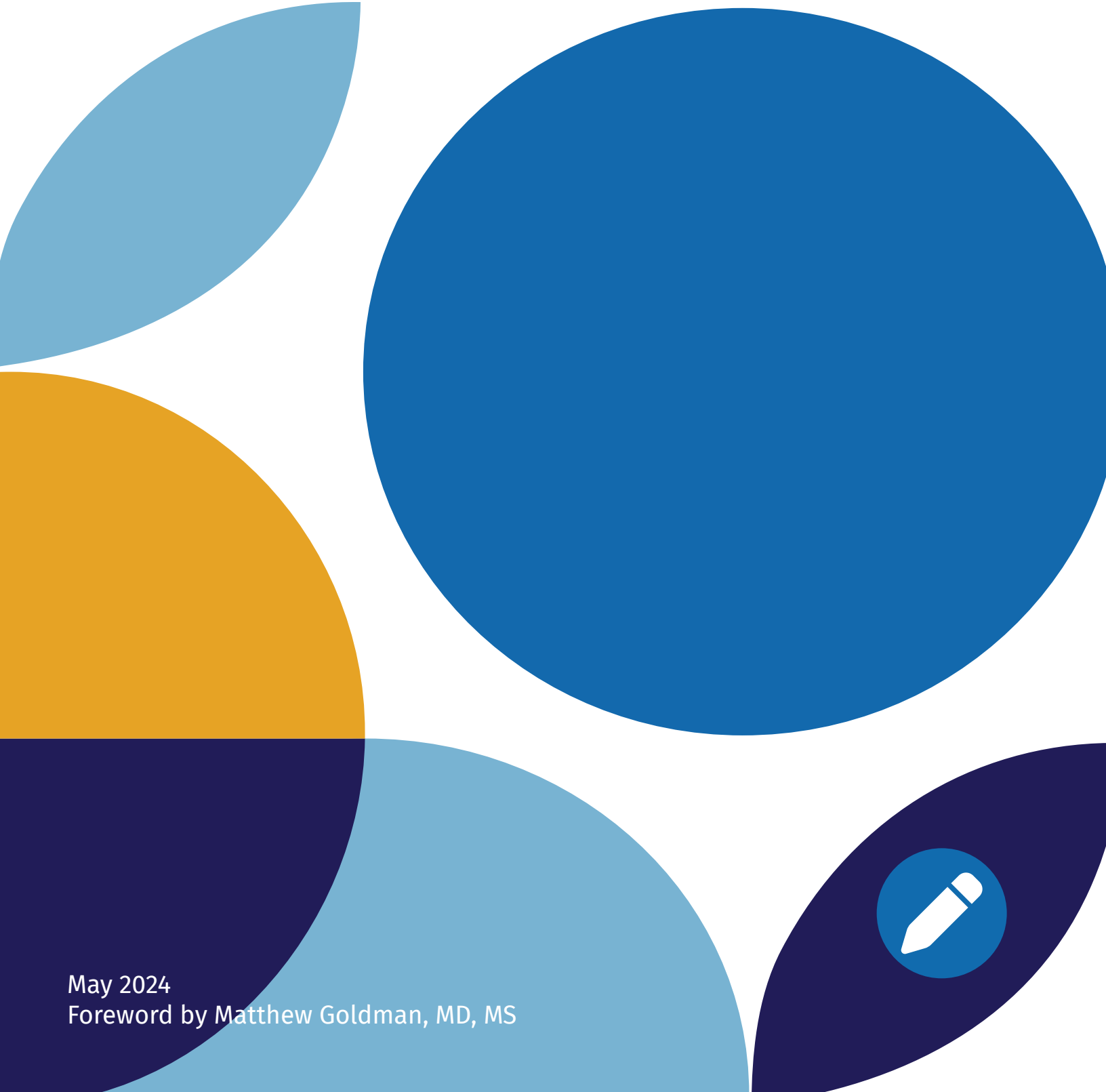


VIRTUAL SERIES OVERVIEW

# 2023 Crisis

# Measurement Series



May 2024

Foreword by Matthew Goldman, MD, MS

## ABOUT CLEAR PATHWAYS

Clear Pathways, an initiative of Peg’s Foundation, seeks to break cycles of incarceration and hospitalization among people experiencing mental health and substance use disorder crises. We work as private, public and philanthropic partners to develop long-term, sustainable solutions so that adults in crisis experience no wrong door in accessing the help and support they need.

Our goal is to help better serve the public while making crisis responses more efficient in Ohio and, eventually, across the country.

With Clear Pathways, we intend to showcase and support long-term, sustainable systems improvements in local crisis continuums.

## ABOUT PEG’S FOUNDATION

Peg’s Foundation, the largest mental health funder in Northeast Ohio, believes in relevant, innovative, and at times, disruptive ideas to improve access to care and treatment for people with serious mental illness. Peg’s Foundation promotes the implementation of a stronger, more effective, compassionate, and inclusive health care system for all. Founded in 2001, Peg’s Foundation provides grants to mental health, education, and the arts. Guided by Founder Peg Morgan to “Think Bigger,” Peg’s Foundation understands recovery from mental illness is the expectation, and mental wellness is integral to a healthy life.

## SUGGESTED CITATION

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## CONTACT

Website: [clearpathwayscollaborative.org](https://www.clearpathwayscollaborative.org)

Email: [info@clearpathwayscollaborative.org](mailto:info@clearpathwayscollaborative.org)

Phone: 330-655-1366



# Foreword

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By Matthew L. Goldman, MD, MS

Behavioral health crisis systems are expanding across the United States at an unprecedented pace. As these services are prioritized and public funds are invested into a range of initiatives across the crisis continuum, systems are asking a critical question: how do we measure success? Success needs to be defined for multiple purposes, including the following:

- on-the-ground continuous quality improvement,
- accountability to funders and community members, and more
- rigorous research approaches to expand the evidence base for crisis services.

Performance measures can also demonstrate cost-effectiveness that can support the longer-term sustainability of these programs. Although some programs may be reticent to measure their success due to understandable concerns that poor outcomes could imperil future funding, behavioral health crisis services offer essential community resources that must be sustained. The performance of crisis services can only be optimized by investing in the data systems, data-sharing agreements, analyst time, and community engagement activities needed to detect when needs are—or are not—being met.



Dr. Matthew Goldman

[“Quality Measurement in Crisis Services”](#) published by the [National Council for Mental Wellbeing](#), outlines a foundation for approaching measurement in crisis services. I am grateful to Peg’s Foundation for the opportunity to explore some key issues in crisis measurement in greater detail in a Crisis Measurement Training Series hosted by the Ohio-based Clear Pathways Initiative. This information brief summarizes those presentations, which are timely additions to help position Ohioans as national leaders in implementing high-quality crisis systems and services.



# Overview and Background

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In 2023, Peg’s Foundation’s Clear Pathways Initiative launched a Crisis Measurement Training Series. This series taught cross-systems partners in Ohio and nationwide how to use quality measurement to advance behavioral health crisis systems. The series explored a core set of concepts for communities looking to develop metric development or use quality measurement data to guide system improvements for individuals in behavioral health-related crises or psychiatric emergencies. Matthew Goldman, MD, MS, co-author of the National Council for Mental Wellbeing’s 2023 “Quality Measurement in Crisis Services,” led the four-part training series.

The Crisis Measurement Training Series ran from April 2023 to October 2023. Series attendees were composed of cross-systems partners from the following domains:

- Behavioral health system
- Criminal legal system, including law enforcement and emergency medical services
- Hospital systems
- State and county government agencies
- Philanthropic organizations
- Peer support organizations

The goals of the training series were the following:

- Introduce a framework for categorizing and managing crisis metrics using a person-centered approach.
- Advance participants’ understanding of measurable criteria in an ideal crisis system, including data infrastructure and cross-system linkages.
- Deliver a “how to” guide for selecting crisis system metrics.
- Discuss strategies for using continuous quality improvement to identify challenges and advance goals.
- Address how to manage complexity in crisis system metrics, with a focus on improving equity and access for all.

The complete series is available for free, self-paced viewing on the [Clear Pathways website](#).



# Quality Measurement in Crisis Services: How to Go From Mundane to Meaningful

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SESSION 1 | APRIL 20, 2023

GOALS

**Provide an overview of the National Council for Wellbeing’s “Quality Measurement in Crisis Services” and review the brief’s metric zone framework.**

The first session in the series introduced the National Council for Wellbeing’s landmark publication “Quality Measurement in Crisis Services.” The National Council Medical Director Institute’s Crisis Services Subcommittee developed the brief. This committee is composed of nationally recognized thought leaders in crisis care, including Matthew Goldman, MD, MS; Sosunmolu Shoyinka, MD, MBA; Margie Balfour, MD, PhD; Ken Minkoff, MD; and Joe Parks, MD.

As communities develop mental health crisis systems and increase their sophistication, it is necessary to use performance metrics to measure goals, understand system adherence, or correct deviation relative to intended function. In addition, metrics can be used to demonstrate success or value,

identify areas for continuous quality improvement, and maintain focus on desired outcomes for those experiencing crisis situations.

This session introduced a framework for identifying and measuring delivery of crisis services across unique metric zones, first outlined in [“Quality Measurement in Crisis Services.”](#)

FIGURE 1. “Quality Measurement in Crisis Services”  
(National Council for Mental Wellbeing, 2023).



# Quality Measurement in **CRISIS SERVICES**

## I. Introduction

Mental health crisis systems are becoming increasingly sophisticated and multimodal as localities invest in addressing issues such as emergency department boarding, unnecessary law enforcement involvement in responses to non-criminal health care crises, and inadequate and inequitable access to mental health care services. Crisis systems often share the goals of providing rapid access to care for individuals experiencing mental health challenges to alleviate distress as quickly, safely and effectively as possible. As these systems evolve, it is necessary to use performance metrics that can advance these goals in a consistent, measurable way.

All systems are essentially an aggregation of linked processes working in concert to achieve and consistently replicate specific, intended outcomes. However, they are prone to error (human and otherwise), and few are as complex as the web of services that make up a mental health crisis care continuum. Measuring processes and outcomes provides the means to determine how closely these systems are adhering to their intended function and goals and to determine when deviations occur, so they can be corrected.

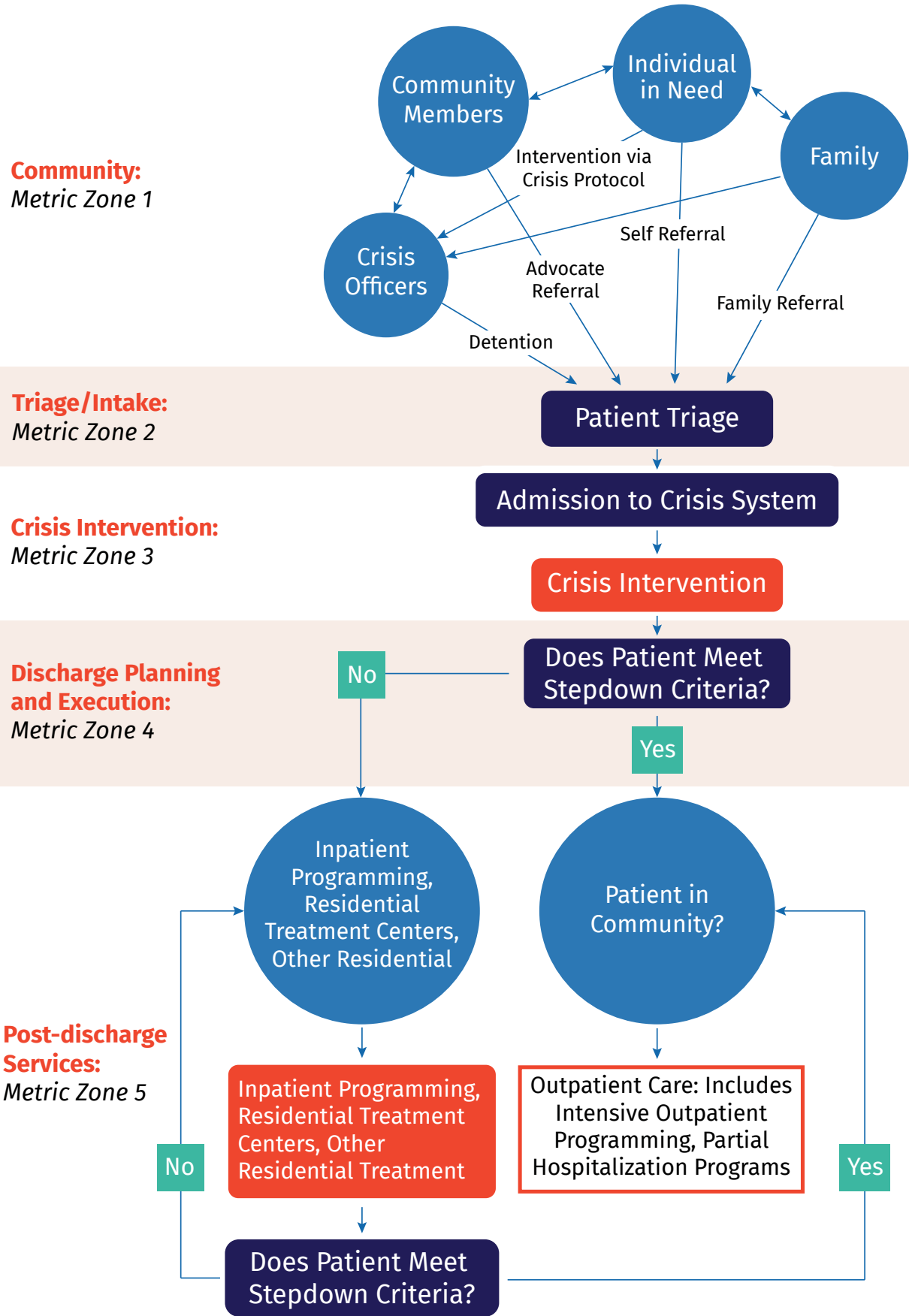
As crisis systems mature across the US, there are increasing demands for measuring their quality, including:

- Reporting mandates tied to funding and accreditation.
- Demonstrating success and value (or the lack thereof).
- Identifying weaknesses to inform continuous quality improvement (CQI) and plan-do-see-act cycles.
- Maintaining a focus on the needs of service recipients based on their own recovery goals.

For optimal performance, crisis systems should employ a “balanced scorecard” approach, i.e., an approach to measuring success that tracks system performance across a combination of different types of metrics. This brief report provides a framework for developing a set of metrics.



FIGURE 2. A Conventional Framework for Crisis Metrics. Adapted from “Quality Measurement in Crisis Services” (National Council for Mental Wellbeing, 2023).





# Selecting Crisis System Metrics: Who, What, and Why to Measure What Matters

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SESSION 2 | AUGUST 30, 2023

GOALS

**Understand how to select appropriate crisis metrics within the structural, process, or outcomes metrics framework.**

The second session of the series served as an intensive course on selecting crisis metrics. The presenters also provided practical examples of local-level success for additional context. Dr. Goldman led the audience through metrics selection considerations, including defining structural, process, or outcomes metrics.

The session also included a presentation from Jonathan Thomas, MA, chief operating officer at the Franklin County Alcohol, Drug, and Mental Health Board. Mr. Thomas shared how Franklin County used a local advisory committee process to select, align, and activate metrics to inform the local crisis response continuum.

FIGURE 3. Metric Categorizations  
(National Council for Mental Wellbeing, 2023).



Structural components and metrics include traditional infrastructure, such as buildings/space, software, computers and space configuration. “Structural” also describes key functional areas with role-based accountabilities.



**Process** engineering and metrics refer to the design of workflows and automatic inputs as well as rapid, expert exception recognition and management.



**Outcomes** metrics refer to well-chosen, critical-to-success service result measures. Outcomes can be standalone items that are considered critical to the crisis program.





# Beyond Reporting: Crisis System Metrics for Continuous Quality Improvement

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SESSION 3 | SEPTEMBER 21, 2023

GOALS

**Review continuous quality improvement measures and how to link them to metrics to inform decision-making.**

The third session of the training series discussed what was next for communities after they selected crisis metrics and identified data collection system partners. Dr. Goldman focused on continuous quality improvement to improve and maintain crisis systems.

During the session, participants learned about specific approaches to continuous quality improvement. Presenters

also discussed strategies to build processes for regular metrics review, including incorporating data into change management. Finally, participants gained insight into linking metrics for continuous quality improvement to inform actionable decisions.



# Managing Complexity in Crisis System Metrics

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SESSION 4 | OCTOBER 19, 2023

## GOALS

**Provide an overview of multisector metrics and review strategies to overcome data fragmentation and improve data integrity.**

The final session of the Crisis Measurement Training Series was intended to enhance the attendee's knowledge of the complexities related to understanding and using multisector metrics and data. The session explored strategies to overcome data fragmentation and improve data integrity. It also highlighted practical tactics for overcoming common challenges, such as privacy issues in data collection and sharing.

Dr. Goldman articulated the importance of tracking race and ethnicity data for equity monitoring to gain insight into addressing associated challenges. He emphasized the importance of using data to ensure that the most marginalized populations receive adequate, quality care.

FIGURE 4. Strategies to Address Complexity





# Conclusion

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The six-month Crisis Measurement Training Series offered by Clear Pathways in 2023 presented actionable insights and tools for communities to advance behavioral health crisis systems. Dr. Matthew Goldman, co-author of the “Quality Measurement in Crisis Services,” led the training series. Attendees were wide-ranging and represented behavioral health, criminal legal systems, physical health, government, and philanthropy.

Throughout the four sessions, Dr. Goldman and his fellow presenters sought to empower cross-system partners to develop strategies to collect, analyze, and leverage data to enhance their crisis response capabilities. Specific strategies were provided to address data fragmentation, promote equitable service delivery, and ensure continuous quality improvement.

It is our hope that by attending the Crisis Measurement Training Series, community partners are better equipped to ensure that people in crisis receive appropriate and equitable care. Clear Pathways stands ready to help communities transform their systems to ensure that individuals in crisis can connect to care, receive an appropriate response, obtain services to stabilize, and thrive in their communities.



## The behavioral health crisis response system should offer people



**Someone to Call**  
Connect



**Someone to Come**  
Respond



**A Safe Place to Be**  
Stabilize



**The Opportunity to**  
Thrive