New to OFR Virtual Training
January 2023

Overdose Fatality Review Team

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Agenda

OFR Purpose

OFR Structure

OFR Fundamentals

- Recruit
- Plan
- Facilitate
- Data
- Recommendations
- Resources

OFR North Star

Overdoses are preventable

Overdose Fatality Review Overview

OFRs involve analysis and **review of aggregate data** to understand overdose trends, select cases to review, and provide context for case findings and recommendations

OFRs involve a series of **confidential individual death reviews** by a multidisciplinary team to effectively **identify system gaps and innovative community-specific** overdose prevention and intervention strategies

These recommendations are presented to a **governing committee** that supports and provides resources for an implementation framework for accountability for action

# The "SOS" Process

Shared Understanding

OFRs increase members' understanding of area agencies' roles and services as well as the community's assets and needs, substance use and overdose trends, current prevention activities, and system gaps.

Optimized Capacity

OFRs increase the community's overall capacity to prevent future overdose deaths by leveraging resources from multiple agencies and sectors to increase system-level responses.
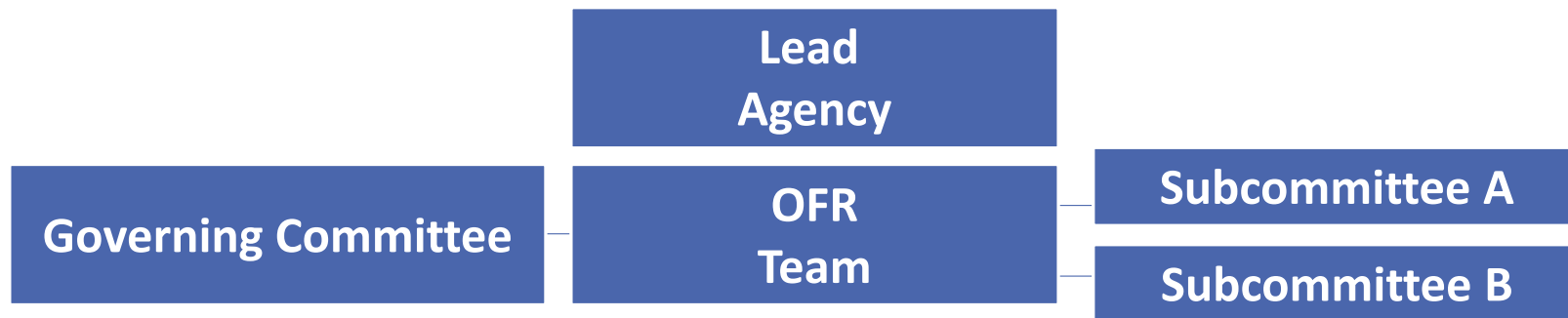
Shared Accountability

OFRs continually monitor local substance use and overdose death data as well as recommendation implementation activities. Status updates on recommendations are shared at each OFR team meeting and with a governing committee, reinforcing accountability for action.
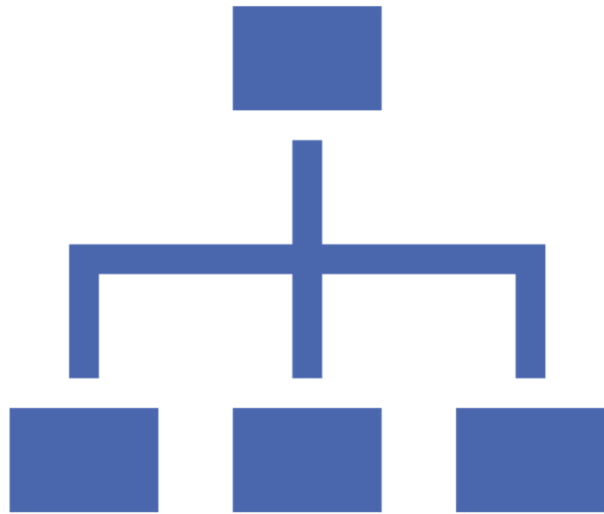
OFR Fundamentals: Structure

OFR Structure

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                    ┌─────────────────┐
                    │      Lead       │
                    │     Agency      │
                    └─────────────────┘
┌─────────────────┐ ┌─────────────────┐ ┌─────────────────────┐
│                 │ │                 │─│   Subcommittee A    │
│   Governing     │─│      OFR        │ └─────────────────────┘
│   Committee     │ │      Team       │ ┌─────────────────────┐
│                 │ │                 │─│   Subcommittee B    │
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Lead Agency: Oversees the OFR team coordination and provides administrative support, ideally a nonpolitical, neutral agency

Governing Committee: Supports and provides resources to implement recommendations generated by case reviews

OFR Team: Multidisciplinary team that reviews a series of individual deaths to identify system-level missed opportunities for prevention and intervention

Subcommittees: Focus attention on a recommendation or need, such as case selection

OFR Leadership Roles

Facilitator

Coordinator

Data manager

Governing Committee

Committee to provide leadership and support for implementing recommendations identified through the OFR process

May be an already existing local drug prevention task force or may be formed solely to support the OFR initiative

Governing committee is composed of senior-level representatives of city, county, and state agencies and community partner organizations

Governing Committee Members

- Chief of police
- Mayor
- Commissioner of health
- Researchers at a local university
- District attorney
- School superintendent
- Medical examiner/coroner
- Chief executive officers at local hospitals
- County sheriff
- Attorney General
- Secretary of Department of Corrections
- Behavioral health administrator

Subcommittee Structure

- **Bulk of work occurs between meetings** at the subcommittee level
- Subcommittees meet separately from the OFR team
- Subcommittees are formed and disbanded as needed
- Membership includes:
    - OFR team members
    - Governing committee
    - Outside experts (e.g., experts related to addiction, homelessness, veterans' affairs, or family survivors)
- Report on subcommittee's aims and progress at OFR case review meetings

OFR Fundamentals: Recruit

Confidentiality is Essential

- Data sharing agreements
- Confidentiality agreements
- State legislation

Consistent Participation by 10-35 members

- Essential members
  - Medical examiner/coroner
  - Public health
  - Public safety (criminal justice and EMS)
  - Health care
  - Behavioral health
  - Child services

Consistent participation and sharing of information by essential members include case-level data, aggregate date, and agency response, practice, and protocols.

Effective Recruitment
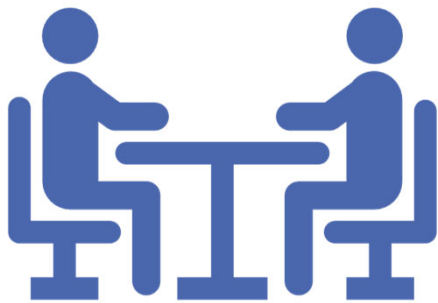
- Meet one-on-one

- Explain the OFR goals and reviewing overall structure

- Share stated and unstated group rules/norms

- Emphasize the purpose of the meeting is not to point fingers at other participants

- Address any data sharing or confidentiality concerns and having them sign a confidentiality agreement

- Summarize past and current recommendations relevant to their organization or area of work

- Suggest immediate ways they can participate in developing and implementing a recommendation

LS0   one of the questions I hear is what type of information/records should members be sharing. We could include that language either here, data or in facilitation but i think we need to clearly outline what member sharing expectations are
Lauren Savitskas, 2022-12-29T15:22:42.182

LS0 0   slide 28 it would fit nicely too
Lauren Savitskas, 2022-12-29T15:23:25.809

Ongoing Recruitment
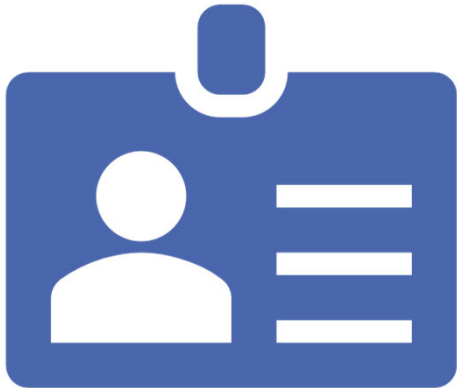
- Continually identify, recruit, onboard, and train new OFR members and governing committee members

Multidisciplinary essential members will result in a more complete understanding of the community, the services available, and their interaction with the decedent over the course of his or her life.

Guest members

- Elected officials serve as guest members or observers not core members

Build and Maintain Relationships

- Encourage networking among members
- Allow for member updates at the beginning or end of the meeting
- Attend member agencies' events
- Observe member agencies' programs

OFR Fundamentals: Plan

Closed-Meeting Format

- Given the sensitive nature of the information shared and the need to need to build trusted relationships
- **OFR meetings are closed and not open to the public**
- Each invited meeting attendee, including guest members or observers, needs to review and sign appropriate confidentiality forms to attend.

Consistent Monthly Meeting

- A regularly scheduled OFR meeting will increase members' consistent attendance.

- Consistent attendance helps build rapport and trust within the team.

- Trust allows for more open dialogue about each case and increases commitment to recommendations.

- Meeting monthly speeds up the formation of the group's positive dynamics and its identification and implementation of recommendations that will prevent future overdose deaths.

OFR Meetings 90-120 Minutes

- Reviewing overdose fatalities is hard work—emotionally and psychologically.
- Meetings that are too short will not allow adequate time to provide status updates, in-depth case review, and recommendation identification.
- Meetings that last too long can result in diminishing participation by members.

Review Two to Four Cases

- Typically, each case will take 30 to 60 minutes
  - Depending on the review team's experience and the complexity of the case
  - Cases with limited data and information will not be as useful to discuss as cases with more information or system interactions.

Select Cases Based On Data-Driven Themes

- It may not be feasible for an OFR team to review every death in its jurisdiction.

- The coordinator may task a subcommittee with developing case selection criteria and/or selecting cases.

- Cases may be selected based on themes such as:
  - Geographical neighborhoods with high rates (e.g., cases from the northside neighborhood)
  - Populations with recent increases in deaths (e.g., young adult white females)
  - Substances involved in most recent overdose deaths (e.g., fentanyl)
  - Populations with known system interactions that may benefit from review (e.g., overdose deaths after recent release from incarceration or treatment)
  - Address a disparity

Consistently Have At Least Three Essential Data Sources

- Essential OFR data sources:
  - Coroner or medical examiner reports (scene investigation, autopsy, and toxicology)
  - Medical/health records
  - Behavioral health records
  - Next-of-kin interview
  - Criminal justice records
  - Child services reports
- Blending input from public health, public safety, providers, and the community
  - OFR teams develop program and policy recommendations to improve coordination and collaboration between agencies and community conditions to prevent future overdose deaths.

Identity of Decedents Known by Members

- Ideally, all members will know the identity of the decedent.
  - The more informed members are about the decedent, the more comprehensive their understanding is of the decedent's interaction with various agencies and systems throughout his or her life and what could have been done to prevent the overdose death.
- Another alternative is to have the decedents' identities known only to the data sharing OFR members.
  - This is referred to as a partially identified case review.

Planning: Coordinator's Role

1. Receive case list
2. Select cases
3. Identify and recruit guest OFR members
4. Request case information
5. Send meeting reminder
6. Summarize case(s)
7. Document activities since last meeting
8. Print agenda and meeting materials

Planning: Member's Role

1. Receive and review the case information
2. Consider implications
3. Identify agency's contact
4. Prepare to share case information
5. Participate in group discussion
6. Take notes during the meeting
7. Invest in networking

5-minute break

OFR Fundamentals: Facilitation

Standard Meeting Agenda

1. Opening Remarks and Introduction
2. Goals and Ground Rules
3. Confidentiality
4. Case Presentation
5. Member Report-Outs (reverse chronological)
6. Group Discussion
7. Case and Timeline Summarized
8. Formulate Recommendations
9. Summarize and Adjourn

Aggregate Data & Member Updates

- Report on any aggregate date updates since last meeting
- Share aggregate data summary for the period of time when decedent died
- Provide case selection criteria information for cases reviewing
- Allow members to provide any updates on agency activities or recommendation efforts since last meeting

Sample Ground Rules

- Be on time—at the beginning of the meeting and coming back from breaks.

- Listen actively to what other people are saying.

- Be respectful—no mocking or attacking other people's ideas.

- See all members as equal. Avoid favoring members with leadership titles.

- Maintain and protect confidentiality.

- Use appropriate and sensitive language when discussing the case.

- Use person-first language, such as "a person addicted to drugs" versus "a drug addict."

Review Confidentiality

- Collects members' reviewed and signed confidentiality forms and answers any related questions.

- Reminds team members that the meeting is closed and that the information shared in the meeting shall not be discussed outside the meeting, as outlined in the agreements they have signed.

Case Presentation

- Presents the case summary developed by the coordinator
  - Name, aliases
  - Date of birth, date of death
  - Demographics (age, race, sex)
  - Address of residence
  - Incident location, date, and time
  - Obituary summary information
  - Pertinent news coverage information
  - Relevant social media posts
  - Details from interviews with the decedent's family members and social contacts
- If each member is given a summary document, all documents should be collected at the end of the meeting.

Member Report-Outs (Reverse Chronological)

- Calls on each member to share what he or she knows about the decedent, his or her social connections, and the overdose incident
  - Starting with the medical examiner and first-responder agencies to developing an incident timeline
  - Then determining the best approach to receive report outs from the remaining members, based on the specific case
- The information shared helps members understand:
  - Where the decedent lived, socialized, worked, and played
  - Risk factors and missed opportunities for prevention and intervention

Group Discussion

Actively guides the group discussion by encouraging members to ask questions. The group discussion will clarify the timeline of significant life events and identify missed opportunities for prevention and intervention.

Sample Timeline of Decedent's Life Events

9 April 2020

EMS responds to nonfatal overdose

1 September 2020

Decedent released from county jail

9-1-1 call related to a domestic assault

18 August 2020

Decedent found dead of an overdose

7 September 2020, 5:00 p.m.
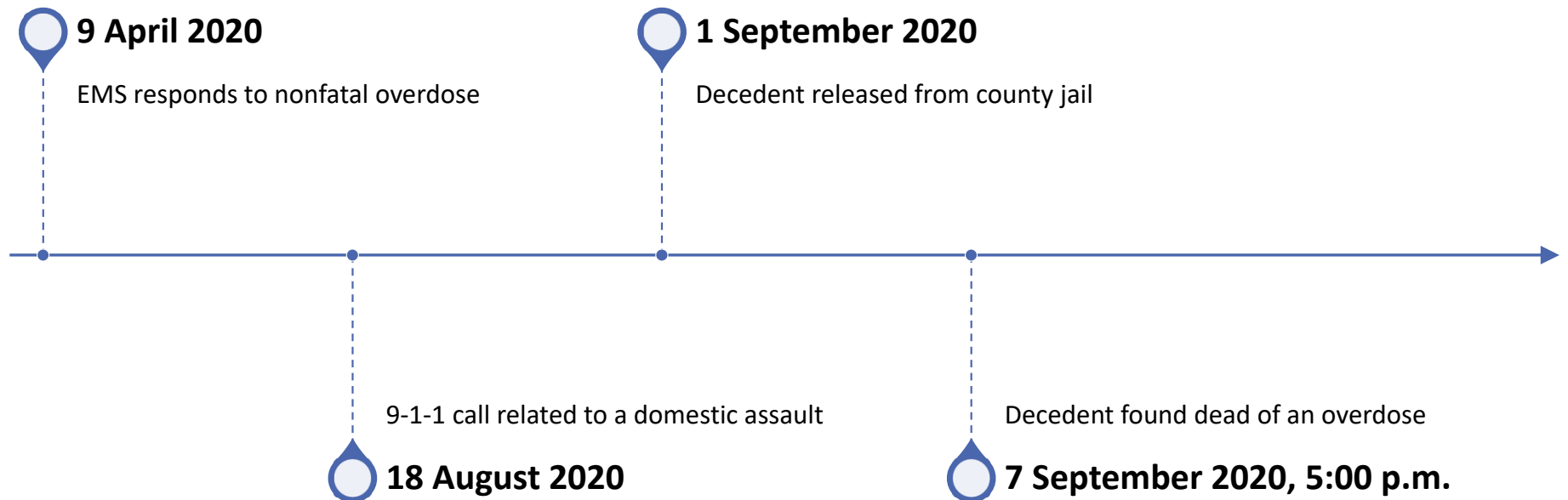
Formulate Recommendations

Leads a problem-solving discussion to identify recommendations for change in practices or policies that may have prevented this overdose death and may prevent those in the future.

Questions to Guide Recommendation Identification?

- What factors contributed to the person being at risk for a fatal overdose?

- What prevention and intervention efforts exist that could have prevented the death and others like it?

- What is working? What isn't working?

- What doesn't yet exist?

- How does each case compare to the aggregate data?

- What are the agreed upon recommendations for prevention and intervention strategies?
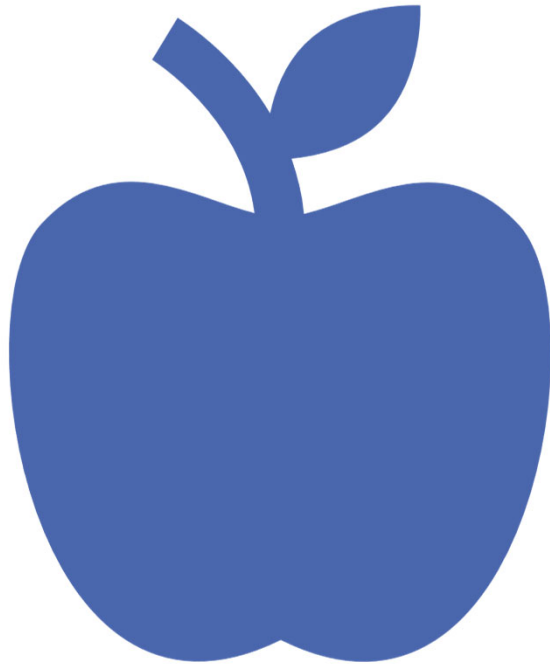
APPLE Technique

Ask the question

Pause for members to think

Pick a member to answer/respond if no one is volunteering

Listen to the response

Expound or elaborate on what was said and relate it to the rest of the discussion

Summarize and Adjourn

- The facilitator reviews and clarifies actionable recommendations, assigns individuals responsible for any action items, reflects on the meeting's process and findings, and collects any participants' handouts containing case information.
  - The facilitator recaps how the meeting went and relates today's review to other cases or to a larger context, such as by saying, "Today's case involved a heroin-laced fentanyl, and there has been an increase in such reported cases in recent months from this area of the city."
  - The team determines whether the investigation is complete or whether more information is needed.
  - Remind members of confidentiality and collect any papers with confidential information.
  - Remind members of the time and location of the next meeting.
  - Encourage members to practice self-care and follow up with facilitator if helpful

Facilitation Expectations
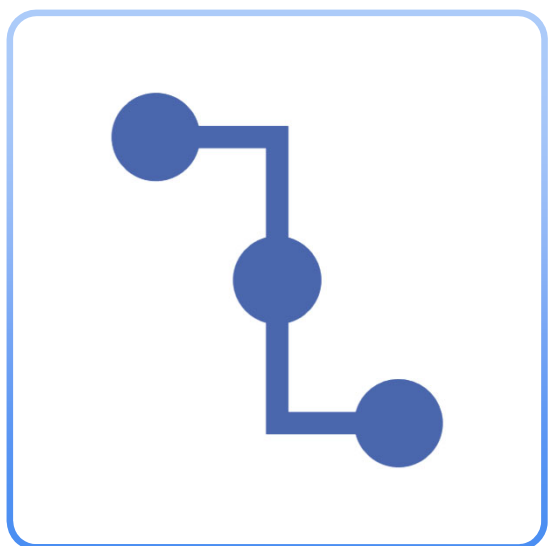
- Provide consistent, quality facilitation
- Encourage all members to share and ask questions
- Use of person-first language by all members
- Respectful conversations by all OFR members
- Incorporate social determinants and a racial equity lens
- Ask probing and clarifying questions
- Ask open-ended and reflective questions

Facilitation Expectations

- Sees all members as providing equal value
- Leads but does not direct discussion
- Encourages group participation and engagement
- Balances conversation to encourage less-vocal members to participate
- Guides the group towards collective problem solving to craft recommendations
- Navigates difficult conversations
- Summarizes, pauses, and checks with the group before making decisions

Facilitation Strategies

- Thank members
- Summarize members' comments
- Solicit a variety of solutions/recommendations
- Address misinformation
- Acknowledge all potential solutions
- Ask for help
- Anticipate possible areas of tension or bias
- Politely redirect members
- Remind members of the guiding "North Star

Facilitator's Qualities

- Professional
- Good, active listener
- Communicates clearly
- Encourages open conversation
- Connects with the group
- Develops trust with partners
- Reads group's body language and dynamics
- Creates an inclusive environment: brings partners together, encourages sharing of information and views, and creates a safe place to share

Measuring Meeting Success

- Agencies continue to send staff members to the reviews.

- Members contribute to the discussion.

- Members are open to feedback and are not defensive.

- Members come more prepared for each meeting.

- Members linger after the meeting has formally ended to network with other members.

- Members begin to see connections between seemingly unrelated overdose deaths and develop a shared analysis.

- Agencies report that the information is useful to their daily work.

- Each agency is working on at least one recommendation during the year.

5-minute break

OFR Fundamentals: Data

Securely Collect and Store Data
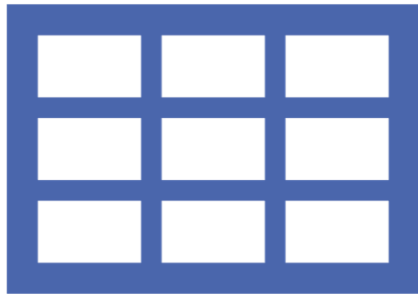
- Use the OFR Data System

- Assign one person to enter data into the OFR Data System

- Analyze and use OFR Data System data

- County Profile
- Recommendation Monitoring
- Next-of-Kin Interview
- Case Information
  - OFR Administration
  - Decedent Demographic Information
  - Cause of Death
  - Scene of Overdose and Death
  - Drugs at the Scene of Death
  - Death Investigation and Toxicology Information
  - Interventions Following Overdose

- Case Information, continued
  - Life Stressors
  - Health History and Health Care Access
  - Prescription Drug Monitoring Program Summary Indicators
  - Mental Health History
  - Substance Use History
  - Trauma History
  - Criminal Justice History
  - Social Services History
  - Education History
  - Recommendations
  - Site-specific Community Context Variables
  - Site-specific Variables
  - Narrative Section

OFR Data System Guidance Documents

1. OFR Administration

1.1) Case-unique identifier (REDCap generated)

Variable: case_id

Question type: Automatically generate by REDCap

Definition: REDCap will generate a unique case ID.

Guidance: None

Reference: None

1.2) Name of person completing this form
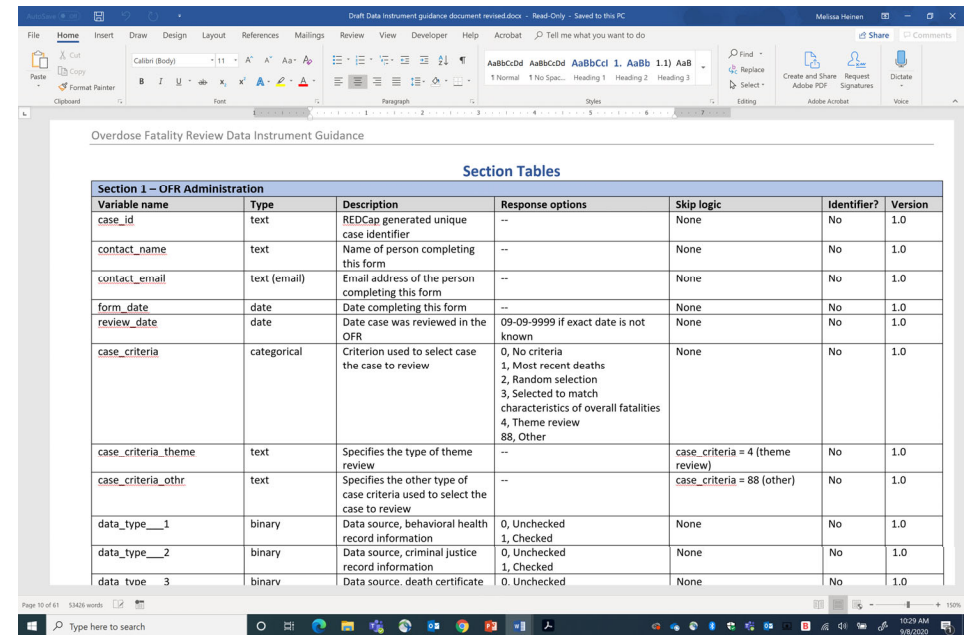
Variable: contact_name

Question type: Text entry

Definition: First and last name of the person completing this case record information.

Guidance: These are the first and last names of the person entering the data for this case.

Reference: None

Overdose Fatality Review Data Instrument Guidance

Section Tables

Section 1 – OFR Administration

Variable name	Type	Description	Response options	Skip logic	Identifier?	Version
case_id	text	REDCap generated unique case identifier	--	None	No	1.0
contact_name	text	Name of person completing this form	--	None	No	1.0
contact_email	text (email)	Email address of the person completing this form	--	None	No	1.0
form_date	date	Date completing this form	--	None	No	1.0
review_date	date	Date case was reviewed in the OFR	09-09-9999 if exact date is not known	None	No	1.0
case_criteria	categorical	Criterion used to select case the case to review	0, No criteria 1, Most recent deaths 2, Random selection 3, Selected to match characteristics of overall fatalities 4, Theme review 88, Other	None	No	1.0
case_criteria_theme	text	Specifies the type of theme review	--	case_criteria = 4 (theme review)	No	1.0
case_criteria_othr	text	Specifies the other type of case criteria used to select the case to review	--	case_criteria = 88 (other)	No	1.0
data_type___1	binary	Data source, behavioral health record information	0, Unchecked 1, Checked	None	No	1.0
data_type___2	binary	Data source, criminal justice record information	0, Unchecked 1, Checked	None	No	1.0
data_type___3	binary	Data source, death certificate	0, Unchecked	None	No	1.0

Access OFR Data System
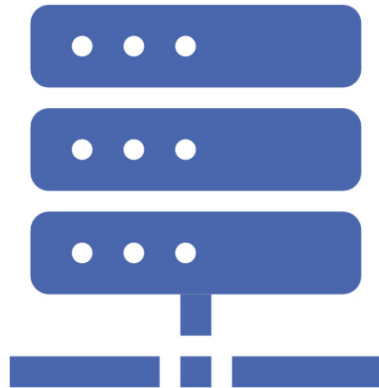
- Local on-site REDCap Server

- State REDCap OFR Data Access Group (DAG)

- IIR REDCap OFR Data Access Group (DAG)

- Data Access Groups are a feature of REDCap that allows for multiple centers to enter data into the same database (or tool) but only have access to their own data and cannot see other centers' data.

Use the OFR Data System

- Register online to use OFR Data System
- Participate in monthly OFR Data User Group

OFR Fundamentals:
Recommendations

Case Review→ Recommendations → Action
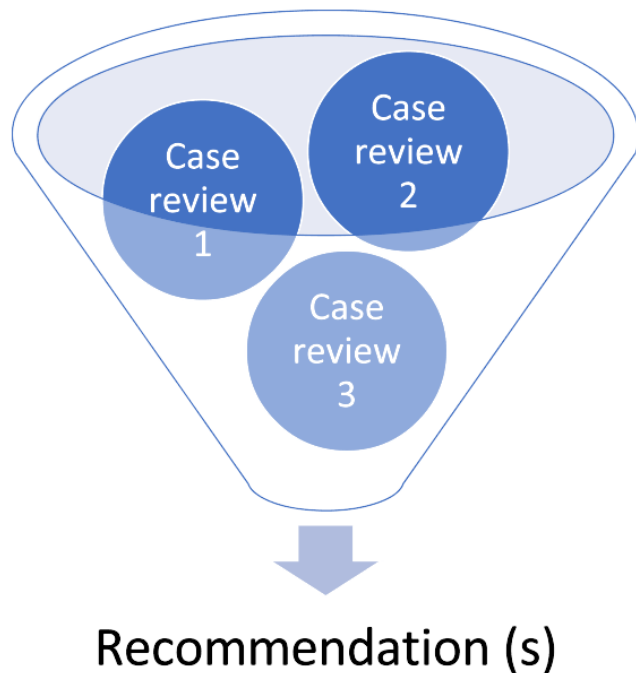
Example: All these cases missed their first substance use disorder (SUD) treatment appointment after release from local jail. How often do people connect with community treatment after release?

Build a Recommendation Plan
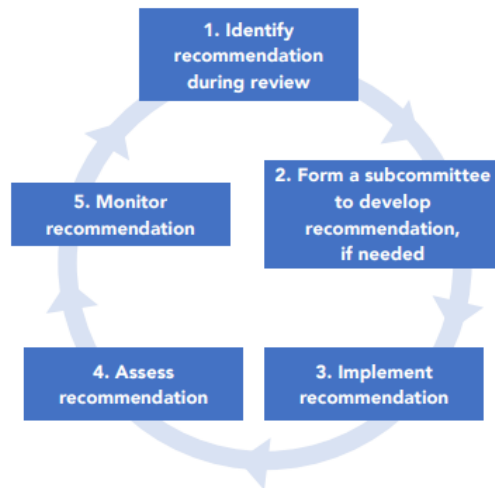
- Identify at least one recommendation at each review meeting
- Identify recommendations through the review process
- Identify local, state, and national recommendations
- Track recommendations in the OFR Data System
- Develop a workgroup and work plan to monitor the implementation of recommendations
- Have a separate leadership group to support recommendations/initiative
- Refine recommendations over time with new information
- Update the OFR team on the status of the recommendations at each meeting
- At least annually, draft a report to showcase progress, findings, and recommendations

What Makes a Good Recommendation?

⭐ Specific

🎬 Measurable

Actionable

⏱ Assigned to a specific agency

📈 Time-bound

📊 Data-informed

LS0   perhaps to in the weeds but could we include a slide about analyzing recommendations, prioritizing recommendations, selecting recommendations, moving/utilizing a subcommittee etic ?

Lauren Savitskas, 2022-12-29T15:25:44.423

Resources

Overdose Fatality Review: A Practitioner's Guide to Implementation
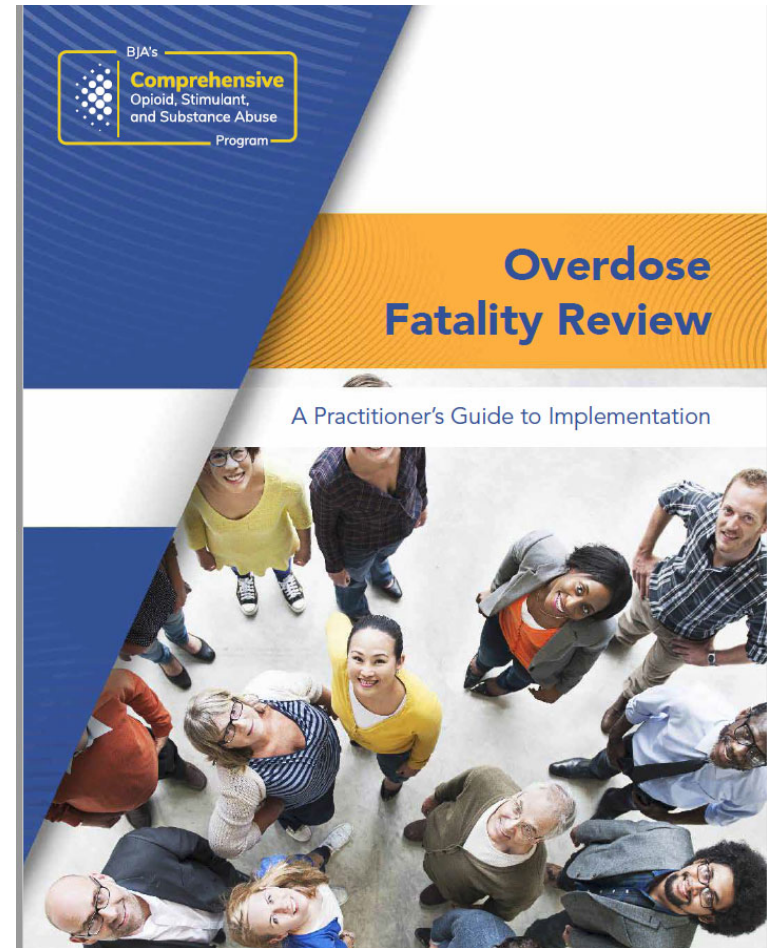
Modules

Recruit

Recruit Your OFR Members

Plan

Plan Your OFR Meeting

Facilitate

Facilitate Your OFR Meeting

Collect

Collect Your OFR Data

Build

Build a Recommendation Plan

OFR Online Toolkit

https://www.cossapresources.org/Tools/OFR

OFR Resources

OFR Project Management Tools

Overdose Fatality Review:
Project Management Tool Instructions

Author: Christina Galardi, MPH, MCRP with CDC Foundation

National Standards

Resources from
Legislative Analysis and Public Policy Association (LAPPA)

Information Sharing Toolkit   Model Law

Information Sharing Scenarios

- Obtaining medical records
- Obtaining behavioral health records
- Obtaining educational records
- Obtaining child services records
- Obtaining prescription drug monitoring program (PDMP) records
- Obtaining next-of-kin consent
- Allowing nonmember professional observers
- Limiting use of shared information
- Freedom of information act request
- Template: Next-of-kin consent

OFR Model Law
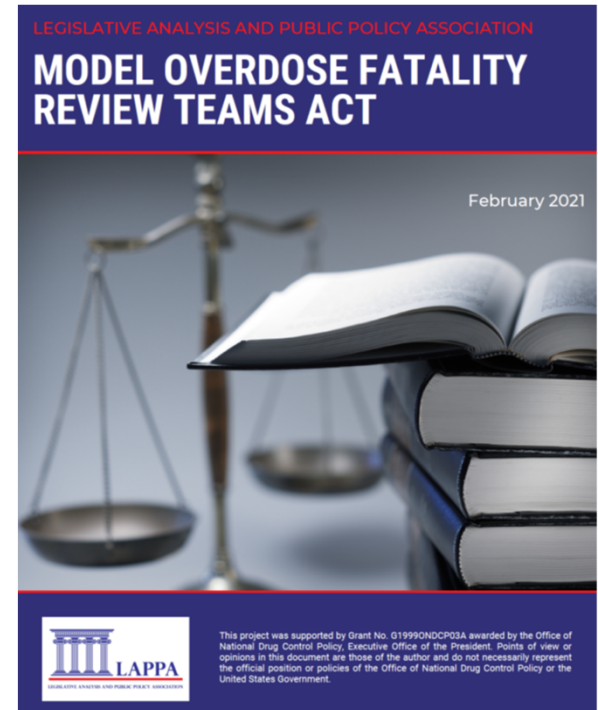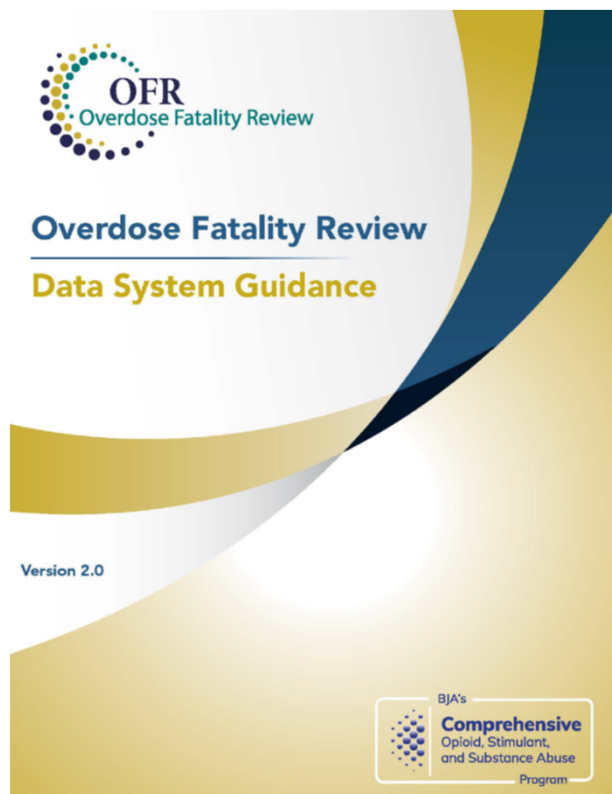
OFR Data System

OFR Mentor Program

- Opportunity for new OFR sites to learn from experienced peers
- Pronged approach: direct communication, virtual or in-person site visits and follow up evaluation
- Travel compensation for sites meeting in-person
- Two tracks for observation
  - OFR Mentor
  - OFR Mentor Plus

Training and Technical Assistance

OFR Email Exchange

Great way to network with your peers

- Send an email to the group (OFR@cossapresources.org) and every member of the list will get the email. That is all there is to it.

- Sign up by emailing COSSAP@iir.com requesting to be added to the COSSAP OFR Email Exchange

Register your OFR

LS0   additional slide for conveings and NOK?
            Lauren Savitskas, 2022-12-29T15:26:42.097

Next-of-Kin Interviews

Virtual Office Hours

Thursday, January 12, 2023 from 1:00 – 2:00 p.m. ET

Thank you!