



Toolkit for Modifying Evidence-Based Practices to Increase Cultural Competence: Checklist and Workbook

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Toolkit for Modifying Evidence-Based Practices to Increase Cultural Competence: Checklist and Workbook

In order to enhance the usability of the *Toolkit for Modifying Evidence-Based Practices to Increase Cultural Competence*, the Center for Excellence in Culturally Competent Mental Health has created two supplemental tools: a checklist and workbook.

The Checklist:

The Checklist is designed to help Toolkit users keep track of their activities throughout the process of modifying EBPs for cultural groups. Each action item is listed in the order in which it appears in the *Toolkit* and corresponds to the order in which the activity should be considered. Not all organizations will complete each step, as the modification process is highly individualized. While some tasks may be completed rather quickly, others may last the duration of the project.

For steps in which a worksheet has been created, the worksheet identification number has been added. Each worksheet can be located in this document by Worksheet ID number. A status column helps users track the progress of each action item throughout the modification process.

The Workbook:

The Workbook is designed to be used in conjunction with the Checklist and *Toolkit*. The worksheets in the Workbook follow the methodology of the *Toolkit* and provide users with a format for organizing *Toolkit* activities. The use of the workbook may vary from organization to organization based on individual needs and activities, but it provides a basic structure for working through *Toolkit*-suggested tasks.

The following worksheets are provided and are numbered based upon its placement within the *Toolkit*.

WORKING WITH COMMUNITIES

- Identify the types of individuals that are needed for a successful working group
- Provide project information to potential working group members
- Request individuals to serve on the working group
- Encourage champions within the organization and the community
- Establish the collaborative process – communication and meetings.

SELECTING AN EBP

- Identify possible EBPs
- Evaluate the cultural appropriateness of EBPs using Kleinman's explanatory model
- Evaluate the cultural appropriateness of EBPs using Kluckhohn's value orientation model
- EBP-specific considerations in the selection process
- Identify the need for cultural modifications
- Practical considerations in the selection process
- Make a final selection

MODIFYING EBPs

- Consider the cultural values of the community
- Consider structural components of access that may require modification
- Consider process/operational components of access that may require modification
- Consider engagement components that may require modification
- Consider work components that may require modification
- Consider termination/discharge components that may require modification
- Documenting modifications

TOOLKIT CHECKLIST

STEP #	WORKSHEET ID	ACTION ITEM	STATUS (NOT APPLICABLE, NOT STARTED, IN PROGRESS, COMPLETE)
1		Identify clinical need	
2		Identify cultural group(s) to be served	
TASKS ASSOCIATED WITH WORKING WITH COMMUNITIES			
3	2.1	Identify the types of individuals that are needed for a successful working group	
4	2.2	Provide project information to potential working group members	
5	2.3	Request individuals to serve on the working group	
6	2.4	Encourage champions within organization and the community	
7	2.5	Establish the collaborative process – communication and meetings	
8		Working group review of <i>Toolkit</i>	
9		If an EBP has already been selected, provide a detailed description of the EBP to working group to ensure that everyone has a good grasp of the practice	
TASKS ASSOCIATED WITH SELECTING AN EBP			
10	3.1	Identify possible EBPs	
11	3.2	Evaluate the cultural appropriateness of EBPs – Kleinman’s explanatory model	
12	3.3	Evaluate the cultural appropriateness of EBPs – Kluckhohn’s value orientation model	
13	3.4	EBP-specific considerations in the selection process	
14	3.5	Identify the need for cultural modifications	
15	3.6	Practical considerations in the selection process	
16	3.7	Make a final selection	
TASKS ASSOCIATED WITH MODIFYING EBPs			
17	3.2	Evaluate the cultural appropriateness of EBPs – Kleinman’s explanatory model (if not completed in <i>Selecting an EBP</i>)	
18	3.3	Evaluate the cultural appropriateness of EBPs – Kluckhohn’s value orientation model (if not completed in <i>Selecting an EBP</i>)	
19	4.1	Consider the cultural values of the community	
20	4.2	Consider structural components of access that may require modification	
21	4.3	Consider process/operational components of access that may require modification	
22	4.4	Consider engagement components that may require modification	
23	4.5	Consider work components that may require modification	
24	4.6	Consider termination/discharge components that may require modification	
25	4.7	Document modifications	
26		Try out the modified EBP	
27		Evaluate the success of the modification	
TASKS ASSOCIATED WITH IMPLEMENTATION ISSUES			
28		Assess and plan for organization’s current level of readiness for change	
29		Assess and plan for organization’s current level of cultural competence	

TOOLKIT WORKBOOK

2.1 WORKING WITH COMMUNITIES – IDENTIFY THE TYPES OF INDIVIDUALS THAT ARE NEEDED FOR A SUCCESSFUL WORKING GROUP

In the following table, consider the types of individuals that would be beneficial to the working group. The first column indicates the role of the individual (e.g., religious leader, teacher, counselor). The second column is a justification for including this type of person in the working group. The last two columns indicate whether this individual should come from within the agency, the community or both. This table should be as complete as possible as it will serve as a “blueprint” for the formation of the working group. The size of the table can be increased or decreased depending on the needs of the organization.

ROLE OF INDIVIDUAL	RATIONALE FOR SERVING ON THE WORKING GROUP	WITHIN THE AGENCY?	WITHIN THE COMMUNITY?
1.			
2.			
3.			
4.			
5.			
6.			
7.			

2.2 WORKING WITH COMMUNITIES - PROVIDE PROJECT INFORMATION TO POTENTIAL WORKING GROUP MEMBERS

Prior to inviting individuals to serve on the working group, it is helpful to be able to anticipate questions and provide information to invited individuals about the newly forming group. Use the worksheet below to articulate working group goals and the rationale for invitees to participate in the group:

1. Purpose of the project:

- a. Description of the community need that the project will address
- b. Reason for assembling the working group
- c. Description of what an EBP is (see Introduction section of *Toolkit*)
- d. Explanation of why an EBP should be modified (see Introduction section of *Toolkit*)

2. Goals of the working group:

- a. Summarize process for selecting and modifying EBP (see Introduction section of *Toolkit*)

3. Expected time commitment:

- a. Estimates of how frequently the group will meet and the duration of meetings
- b. Estimates of expected individual contribution

4. Rationale for asking invitee(s):

- a. Where does the individual fit into the working group (i.e., why is this individual being asked to join the working group)
- b. Description of other types of people who may be asked to join the working group

5. Benefit of being part of the working group:

- a. Individual benefits: may include being relied upon as an expert and being able to share views/concerns
- b. Community benefits: may include networking with community leaders and members of the mental health community and participating in a rewarding experience

2.3 WORKING WITH COMMUNITIES – REQUEST INDIVIDUALS TO SERVE ON THE WORKING GROUP

The purpose of this worksheet is to track invitees to the working group. This worksheet can be actively used during this iterative process until the working group is fully formed.

Use the roles identified in worksheet 2.1 to identify specific individuals to serve on the working group. The last two columns can record the status of the invitation to serve on the working group. NOTE: There should be at least one entry on this worksheet that corresponds to the roles defined in worksheet 2.1.

ROLE OF THE INDIVIDUAL	INVITEE NAME	INVITEE'S ORGANIZATION	INVITEE'S CONTACT INFO	INVITED TO SERVE ON WORKING GROUP?	AGREED TO SERVE ON WORKING GROUP?

2.4 WORKING WITH COMMUNITIES – ENCOURAGE CHAMPIONS WITHIN THE ORGANIZATION AND COMMUNITY

Step 3 in *Working with Communities* instructs *Toolkit* users to encourage champions within the organization and the community. The purpose of this is to drive the project in a purposeful way with the organization and community sharing responsibility and ownership of the modification project. Organization champions and community champions should have different but complementary roles with each sharing management of the modification project with the other. In order to do this effectively, it is advisable to define roles and responsibilities of each upfront in a collaborative manner. Assignment of these should build on the personal and professional strengths of each.

The following worksheet contains an example of some of the roles and responsibilities of an organization champion and a community champion. The *Toolkit*, checklist, and workbook can be used to help assign specific responsibilities to each champion. Specific responsibilities will vary based on the clinical need, the organization, the community, and whether or not an EBP has already been selected.

ORGANIZATION CHAMPION:	COMMUNITY CHAMPION:
CHAMPIONS' ROLES AND RESPONSIBILITIES	
Coordinate identification of possible EBPs	Coordinate establishment of working group protocols
Coordinate understanding values inherent in EBP choices	Coordinate cultural understanding of the clinical problem using the explanatory model
Coordinate consideration of available resources	Coordinate documentation of values inherent in the cultural community

2.5 WORKING WITH COMMUNITIES – ESTABLISH THE COLLABORATIVE PROCESS – COMMUNICATION AND MEETINGS

Step 4 in *Working with Communities* instructs *Toolkit* users to establish communication and meeting processes. The following template may help the working group to establish these protocols during its first meeting.

Establishing communication and meeting protocols:

1. Compensation for working group members (can include reimbursement for travel, fees for participation and/or “perks” such as meals):
2. Times of meetings:
3. Place of meetings:
4. Frequency of meetings:
5. Process and frequency for evaluating working group member satisfaction:
6. Method for modifying working group process in response to satisfaction measures:

3.1 SELECTING AN EBP – IDENTIFY POSSIBLE EPBs

This worksheet is designed to help *Toolkit* users keep track of possible EBPs. The EBP number is a sequential number that helps users identify the EBP and track the number of EBPs under consideration. EBP TITLE is the name of the intervention under consideration. SOURCE is the name of the resource referring the EBP, and EBP & ID SOURCE INFORMATION is a physical address, web address, and/or contact location from which more information can be obtained about the EBP. MATERIALS AVAILABLE lists the specific materials that are available for evaluation and from where they can be obtained.

An example is provided below.

EBP #	EBP TITLE	SOURCE	EBP & ID SOURCE INFORMATION (including developer contact information)	MATERIALS AVAILABLE
1	Critical Time Intervention	NREPP	http://www.nrepp.samhsa.gov/programfulldeta ils.asp?PROGRAM_ID=101 Developer website: http://criticaltime.org/ Developers can be contacted at: criticaltime@gmail.com	Training and fidelity measures available from developer. On-line and in-person training available: http://criticaltime.org/training-2/

3.2 SELECTING AN EBP – EVALUATE THE CULTURAL APPROPRIATENESS OF EBPS – KLEINMAN’S EXPLANATORY MODEL

The working group is an excellent vehicle for understanding the cultural community’s perspectives on the identified clinical problem. Kleinman and others pose the following questions in order for clinicians to understand how individuals from cultural groups view the issue.

Use the following worksheet within the working group session to develop an understanding of the problem.

1. What does the community call this problem?
2. What are the causes of this problem?
3. Why did this problem develop in the community when it did?
4. What does this problem do? How does it work?
5. How severe is the problem? Does it have a short or long course?
6. What kind of treatment is appropriate for this problem? How can this organization help?
7. Who does the community usually turn to for help? Who is involved in decision making?
8. What are the most important results to receive from treatment?
9. What are the chief problems caused by this problem?
10. What is the biggest fear about the problem?

3.3 SELECTING AN EBP – EVALUATE THE CULTURAL APPROPRIATENESS OF EBPS – KLUCKHOHN’S VALUE ORIENTATION MODEL

The following worksheets help *Toolkit* users articulate and evaluate the values inherent in EBPs and compare them with the values of the cultural group(s) to be served by the EBP. The goal is to ultimately select the EBP that has the best clinical AND cultural fit.

Kluckhohn’s Value Orientation Model, which is the basis for these worksheets, examines five dimensions of societal values. The first worksheet in the series explains possible responses for each dimension (based on Gallagher, 2001). The following page provides space for evaluating a cultural group’s values along each of the five dimensions and space for evaluating an EBP along the same five dimensions.

Note that a full set of these worksheets should be completed for each EBP under consideration.

**HUMAN CONCERNS AS IDENTIFIED BY VALUE ORIENTATION MODEL AND A RANGE OF
POSSIBLE RESPONSES**

DIMENSION	VALUE ORIENTATION		
Innate Predisposition – What is the basic nature of people?	<i>GOOD</i> - Most people are innately good; people are born good	<i>NEITHER GOOD NOR EVIL</i> – There are both good and evil people in the world; people can change if guided properly.	<i>EVIL</i> – Most people are innately evil and can't be trusted. People need to be controlled.
Human Relationships to Nature – What is the appropriate relationship between people and the natural environment?	<i>MASTERY</i> – It is the mission of people to conquer and control nature.	<i>HARMONY</i> – People should live in harmony with nature.	<i>SUBJUGATION</i> – People can't change nature so they are often at the mercy of fate and genetics.
Time Dimension – How should people think about time?	<i>FUTURE-ORIENTED</i> – Planning and goal setting is necessary in order to make things happen. It is important to sacrifice a bit now for a better future.	<i>PRESENT-ORIENTED</i> – The here-and-now is the most important. Live for today.	<i>PAST –ORIENTED</i> – History and tradition are very important. People need to learn from the past and embrace “old fashioned” values.
Human Activity – What is an appropriate level of activity?	<i>ACTIVITY</i> – If people work hard, they will accomplish great things. Human accomplishment is a measure of self-worth.	<i>BEING-IN-BECOMING</i> – It is the mission of people to develop themselves as individuals.	<i>BEING</i> – It is enough to just “be.” Accomplishments are not a measure of how worthwhile an individual is.
Modality of Relationship – How is society best organized?	<i>INDIVIDUAL</i> – People are in charge of their own destinies. Each person is equal in importance to all others.	<i>COLLATERAL</i> – It is important to make group decisions, and everyone should participate in that process. Big decisions should not be made by one person.	<i>HIERARCHICAL</i> – Some people are born leaders and others are followers. Decisions should be made by those in charge.

Adapted from: Gallagher, 2001

FIVE HUMAN CONCERNS AS THEY RELATE TO A CULTURAL GROUP: _____

DIMENSION	VALUE ORIENTATION OF THE CULTURAL GROUP
Innate Predisposition – What is the basic nature of people?	
Human Relationships to Nature – What is the appropriate relationship between people and the natural environment?	
Time Dimension – How should people think about time?	
Human Activity – What is an appropriate level of activity?	
Modality of Relationships – How is society best organized?	

FIVE HUMAN DIMENSIONS AS THEY RELATE TO AN EBP: _____

DIMENSION	VALUE ORIENTATION OF THE EBP
Innate Predisposition – What is the basic nature of people?	
Human Relationships to Nature – What is the appropriate relationship between people and the natural environment?	
Time Dimension – How should people think about time?	
Human Activity – What is an appropriate level of activity?	
Modality of Relationships – How is society best organized?	

3.4 SELECTING AN EBP – EBP-SPECIFIC CONSIDERATIONS IN THE SELECTION PROCESS

While not specifically related to culture or cultural groups, organizations considering selection of a particular EBP must think about additional EBP requirements such as staffing and location. The following worksheet enables *Toolkit* users to evaluate EBP requirements and compare them with organization infrastructure.

When completing the third column in this worksheet (ORGANIZATIONAL ABILITY TO MEET REQUIREMENT), provide one of the following ratings: 0 = unable to meet EBP requirement, 1 = might be able to meet EBP requirement with great difficulty, 2 = might be able to meet EBP requirement with moderate difficulty, 3 = will probably be able to meet EBP requirement with little difficulty, 4 = will be able to meet EBP requirement because the organization is already meeting other clinical needs in this way.

A separate worksheet should be completed for each EBP under consideration.

EBP NAME: _____

PRAGMATIC FACTOR	EBP REQUIREMENT	ORGANIZATIONAL ABILITY TO MEET REQUIREMENT
Modality of practice – individual, group, community, population		
Practitioner – professional, para-professional, etc.		
Location of services – community mental health center, school, religious center, etc.		
Consumers – individuals, families, couples, etc.		

3.5 SELECTING AN EBP – IDENTIFY THE NEED FOR CULTURAL MODIFICATIONS

For each EBP under consideration, it is important to assess the level of modification that will be necessary to meet the needs of the cultural community. The following worksheet helps *Toolkit* users assess the level of adaptation and accommodation necessary. In order to complete this worksheet, working group members will want to review the previous worksheets in the *Selecting an EBP* section of this workbook as well as any materials available for each EBP.

When rating the level of modification necessary, the following values should be assigned: 0 = no modification necessary, 1 = a little modification will be necessary, 2 = a moderate amount of modification will be necessary, 3 = a great deal of modification will be necessary.

For specific explanations of the terms *adaptation* and *accommodation*, refer to page 7 in the Toolkit.

EBP NAME	ESTIMATED LEVEL OF ADAPTATION NECESSARY	ESTIMATED LEVEL OF ACCOMMODATION NECESSARY

3.6 SELECTING AN EBP – PRACTICAL CONSIDERATIONS IN THE SELECTION PROCESS

In preparing to make a final EBP selection, working groups will likely have to consider additional practical factors, some of which are listed on the worksheet below. Other factors should be added to this worksheet based on the needs of the specific organization and working group.

A worksheet should be completed for each EBP under consideration.

EBP NAME: _____

PRACTICAL FACTOR TO CONSIDER	NOTES ON FACTOR
Total costs for implementation – includes EBP pricing, materials, training, support	
Ability to bill for services	
Additional resources needed for implementation – staff, space, etc.	
Other EBP-specific factors – obtained from available materials and developer	
Additional factors	
Additional factors	
Additional factors	

3.7 SELECTING AN EBP – MAKE A FINAL SELECTION

This worksheet provides a format for justifying the final EBP selection. It may help stakeholders within and external to the working group understand the rationale for selecting a particular EBP.

1. EBP SELECTED:

2. OTHER EBPs UNDER CONSIDERATION:

3. JUSTIFICATION OF SELECTION:

- How possible EBPs were identified (see Step 1 in *Selecting an EBP* for more details)
- How possible EBPs were evaluated for clinical appropriateness
- How possible EBPs were evaluated for cultural appropriateness (see Step 2 in *Selecting an EBP* for more details)
- Description of the need for cultural modification (see Step 1 in *Selecting an EBP* for more details)
- Other selection criteria – may want to include information considered in worksheets 3.4 – *Additional Considerations in the Selection Process* and 3.6 – *Practical Considerations in the Selection Process*

MODIFYING EBPs

For each phase discussed in the *Toolkit*, working groups will need to evaluate the EBP and identify how components require change for the cultural group(s) they serve.

The first set of pages presents a list of cultural values which were presented in Table A in the *Toolkit*. On these sheets, users can note specific values that may impact the cultural group as it relates to the type of intervention being considered. For example, for an agency that plans on addressing adolescent alcohol use, *Toolkit* users may want to think about how a particular culture values factors such as age, gender, dating, education, and cultural usage of alcohol and drugs. The working group might then discuss how these impact implementation of a particular EBP.

Additionally, worksheets are included to identify components that may require modifications, note the phase(s) impacted (*physical access, operational access, engagement, work, and termination/discharge*), and the specific modifications necessary. These sheets also provide a status for noting what stage (*not started, in progress, or complete*) the modification is in at any given time.

Working groups will need to refer to the appropriate tables in the *Modifying EBPs* section of the *Toolkit* for in-depth descriptions of components.

4.1 MODIFYING EBPs – CONSIDER THE CULTURAL VALUES OF THE COMMUNITY

(corresponds to Table A in *Toolkit*)

EBP NAME: _____

CULTURAL VALUE	NOTES ON CULTURAL GROUP AS THEY RELATE TO CULTURAL VALUE	NOTES ON EBP AS THEY RELATE TO CULTURAL VALUE
View of mental illness		
Holistic health view		
Attribution		
Degree of Stigma		
Social positioning		
Discrimination		
Equality		
Stereotypes		
Acculturation		
Formality		
Lifestyle		
Housing		
Education		
Social Class		
Development through life		
CULTURAL FACTOR	NOTES ON CULTURAL GROUP AS THEY RELATE TO CULTURAL VALUE	NOTES ON EBP AS THEY RELATE TO CULTURAL VALUE
Age		
Gender		
Dating		
Marriage		
Divorce		
Sexual activity		
Sexual orientation		
Other health problems		
Use of drugs and alcohol		
Specific health problems		
Family/kin relationships		
Family constellation		

CULTURAL FACTOR (cont.)	NOTES ON CULTURAL GROUP AS THEY RELATE TO CULTURAL VALUE	NOTES ON EBP AS THEY RELATE TO CULTURAL VALUE
Disciplining children		
Power in relationships		
Communication		
World View		
Religion/religious practice		
Views of interconnectedness of people		
Views of nature		
Locus of control		
Outlook		

4.2 MODIFYING EBPs – CONSIDER STRUCTURAL COMPONENTS OF ACCESS THAT MAY REQUIRE MODIFICATION

(corresponds to Table B in *Toolkit*)

While all components listed on this table are impacted by structural access, additional phases may be impacted (*process/operational access, engagement, work, termination/discharge*) and should be noted in the PHASES AFFECTED column in order to track changes. Values for PROGRESS STATUS are *not started, in progress, and complete*.

Additional rows should be added to the worksheet, as needed.

COMPONENT	PHASES AFFECTED	PROGRESS STATUS
LOCATION		
TRANSPORTATION		
BUILDING		

4.3 MODIFYING EBPs – CONSIDER PROCESS/OPERATIONAL COMPONENTS OF ACCESS THAT MAY REQUIRE MODIFICATION

(corresponds to Table C in *Toolkit*)

While all components listed on this table are impacted by process/operational access, additional phases may be impacted (*structural access, engagement, work, termination/discharge*) and should be noted in the PHASES AFFECTED column in order to track changes. Values for PROGRESS STATUS are *not started, in progress, and complete*.

Additional rows should be added to the worksheet, as needed.

COMPONENT	PHASES AFFECTED	PROGRESS STATUS
HOURS		
LANGUAGE		
PAYOR		
PROVIDER		
COMPONENT	PHASES AFFECTED	PROGRESS STATUS
INTERVENTION-SPECIFIC TRAINING AND MATERIALS		
WHO IS INCLUDED IN TREATMENT		

4.4 MODIFYING EBPs – CONSIDER ENGAGEMENT COMPONENTS OF ACCESS THAT MAY REQUIRE MODIFICATION

(corresponds to Table D in *Toolkit*)

While all components listed on this table are impacted by engagement, additional phases may be impacted (*structural access, process/operational access, work, termination/discharge*) and should be noted in the PHASES AFFECTED column in order to track changes. Values for PROGRESS STATUS are *not started, in progress, and complete*.

Additional rows should be added to the worksheet, as needed.

COMPONENT	PHASES AFFECTED	PROGRESS STATUS
INITIAL RELATIONSHIP BUILDING		
ASSESSMENT – DIAGNOSTIC AND CULTURAL		
CONTRACTING		

4.5 MODIFYING EBPs – CONSIDER WORK COMPONENTS OF ACCESS THAT MAY REQUIRE MODIFICATION

(corresponds to Table E in *Toolkit*)

While all components listed on this table are impacted by process/operational access, additional phases may be impacted (*structural access, process/operational access, engagement, termination/discharge*) and should be noted in the PHASES AFFECTED column in order to track changes. Values for PROGRESS STATUS are *not started, in progress, and complete*.

Additional rows should be added to the worksheet, as needed.

COMPONENT	PHASES AFFECTED	PROGRESS STATUS
INTERVENTION CONTENT		
HOMEWORK		
MEDICATION		
INTERNALIZATION AND GENERALIZATION		
COMPONENT		
FEEDBACK TO CONSUMER/REWARDS		
DURATION AND NUMBER OF SESSIONS		
OUTSIDE RESOURCES		

4.6 MODIFYING EBPs – CONSIDER TERMINATION/DISCHARGE COMPONENTS OF ACCESS THAT MAY REQUIRE MODIFICATION

(corresponds to Table F in *Toolkit*)

While all components listed on this table are impacted by process/operational access, additional phases may be impacted (*structural access, process/operational access, engagement, work*) and should be noted in the PHASES AFFECTED column in order to track changes. Values for PROGRESS STATUS are *not started, in progress, and complete*.

Additional rows should be added to the worksheet, as needed.

COMPONENT	PHASES AFFECTED	PROGRESS STATUS
CONCLUSION OF WORK		
EVALUATION OF WORK		
PLANNING FOR AFTERCARE		

4.7 MODIFYING EBPs – DOCUMENT MODIFICATIONS

Step 3 in *Modifying EBPs* instructs *Toolkit* users to document the modifications they make to EBPs. The purpose of this is to fully understand the differences between the original EBP and the modified version. The process of tracking modifications should be done throughout the project in order to keep modifications documentation complete.

The completed list of modifications can be useful during and after the piloting of the EBP, when it is possible that adjustments to the modified EBP may need to be made. Also, understanding where modifications have been made may assist the organization in other modification projects, in effectiveness studies, or for sharing with other organizations looking to do similar work.

The following worksheet can help organizations track modifications to EBPs. Modifications should be numbered sequentially in the first column. The “Summary of Modification” should include a brief synopsis of the modification noting whether the modification is an addition, change to, or subtraction from the original EBP. “Phase(s) Impacted” refers to the phases of the helping process effected by the modification. The list of “materials impacted” should be comprehensive and may include materials for consumers, providers, or both. The “responsible party” is a go-to person with regard to the specific modification. “Documentation x-ref” may include references to additional documents related to the change including meeting notes, justifications, etc.

An example of the use of this worksheet is included below.

MOD #	SUMMARY OF MODIFICATION	PHASE(S) OF IMPACTED	MATERIALS IMPACTED	RESPONSIBLE PARTY	DOCUMENTATION X-REF
1	Addition of 2 sessions to parent group to discuss how parenting styles are culturally bound.	Engagement, work	Provider manual, consumer workbook	John D.	See notes from working group meeting 1/1/09. See highlights in provider manual and consumer workbook.