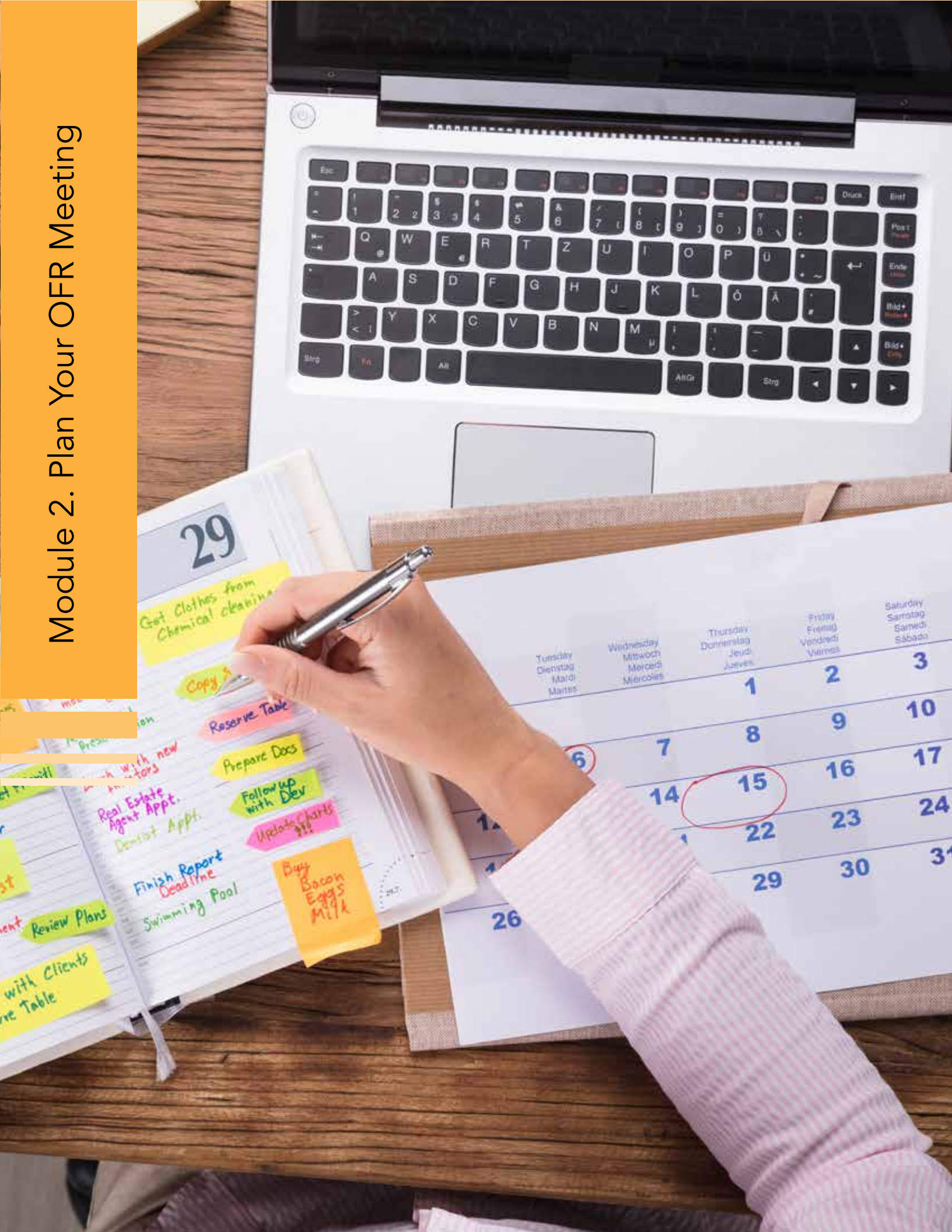


Module 2. Plan Your OFR Meeting



Plan Your OFR Meeting

Module

2

This module will assist overdose fatality review (OFR) coordinators in planning OFR meetings and prepare partners to actively and thoughtfully participate in meetings.

2A. Meeting Logistics

Meeting Schedule

The meetings are held when and where most members can attend. The schedules and locations of the entire year's meetings should be developed at the beginning of the year so that OFR team members can plan accordingly.

A typical meeting will be two to three hours in length and each case will take about an hour, depending on the complexity of the case and the review team's experience.

Meeting Room Layout

The meeting room layout is important for group dynamics and inclusion. Hosting the OFR team meeting in a circle or a hollow rectangle layout gives everyone an equal position at the table and allows for face-to-face interactions by all participants. In addition to having adequate space for desired layout, it is ideal to have a whiteboard in the meeting room for taking notes and

Remember:

Each meeting attendee, including guest members or invited guests/observers, needs to review and sign appropriate confidentiality forms to attend.

displaying the created timeline of significant life events leading up to the decedent's overdose death.

Closed-Meeting Format

Given the sensitive nature of the information shared and the need to build trusted relationships, the OFR meetings are closed and not open to the public.

Sometimes, invited guests will participate or observe to learn more about OFRs. Most often, the invited professionals have information specific to the case and are called guest members.



Tip:

Having timely data is critical for a successful OFR initiative.

2B. Meeting Preparation: Coordinator's Activities

Successful OFR case reviews depend on thoughtful preparation by the OFR coordinator, beginning a month or two before an OFR case review meeting. A list of coordinator activities and a timeline is provided below and in the Coordinator's Meeting Preparation Checklist provided in Appendix B.

1. Select cases

Beginning two months before the meeting, the cases to be reviewed at the upcoming meeting need to be selected.

Having timely data is critical for a successful OFR initiative. The medical examiner's/coroner's office can be an excellent source for identifying overdose cases and initial case information. If possible, have someone with access to the medical examiner's/coroner's data on the case selection subcommittee and the OFR team. Ideally, this person will gather information about overdose fatalities as they occur.

Once cases are identified by the medical examiner/coroner, allow enough time for toxicology results to be known and police officers to investigate an overdose before selecting the case for review. This will enable the data to be collected and organized for a more complete case review.

2. Case selection criteria

It may not be feasible for every OFR team to review every death in its jurisdiction. In this situation, the coordinator may task a subcommittee with developing case selection criteria and/or selecting cases.

To help select cases, the following may need to be decided:

- **Jurisdiction inclusion**—residents from the jurisdiction or deaths within the jurisdiction

- **Substances involved**—all overdose deaths or only deaths from a specific substance will be included, for example, opioid-involved deaths
- **Cause of death**—only unintentional overdoses; include all (suicides and undetermined deaths) overdoses, or drug-related injuries, such as car crashes or hypothermia complicated by opioid use
- **Cases under investigation**—exclude cases in which there is an open law enforcement investigation

Once the core case criteria are determined, further case selection criteria may be needed to narrow the selection of cases to a feasible number. Criteria may include the following:

- 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)

3. Recruit guest OFR members

Beginning six weeks before the meeting, the coordinator needs to identify guest members, in addition to OFR team members, that he or she needs to recruit.

Agencies that are not already OFR members and that may have provided services to the decedent (such as a behavioral health provider) or that serve the community in which the decedent lived, such as social services or housing and employment supports, may be recruited to participate in a specific case review. The agencies to participate may be identified from the medical examiner's/coroner's report or from news coverage about the death.

An email and follow-up phone call to discuss the OFR process and purpose can be an effective method for getting participation. It is important to share and review interagency and confidentiality agreements. Have the agreements signed before discussing details of the case or requesting case information. Sample recruitment letter and agreements are included in Appendix A and D.

4. Request case information

Once interagency agreements are in place and around a month before the meeting, case-specific information should be requested of all team members. The information should be protected in accordance with confidentiality standards. If possible, use an encrypted email to request information about the case.

The email requesting case information should include the decedent's information listed below and guidance on what information is requested from members, including what specific data members should report out. A sample OFR case email, a member's guide to collecting case information, and a list of agency-specific data elements is included in Appendix B.

Decedent information:

- Name, aliases
- Date of birth, date of death
- Demographics (age, race, sex)
- Address of residence
- Incident location, date, and time

5. Send meeting reminder email

Two weeks prior to the review, an email including the following should be sent to OFR members:

- Brief summaries of cases
- List of meeting participants
- Meeting agenda
- Meeting date, time, and location

A sample two-week reminder email is included in Appendix B.

6. Summarize case(s)

Prior to the meeting, the coordinator will want to summarize in a PowerPoint presentation or handout additional information identified by reading the obituary, news coverage, or social media posts or by interviewing family members or social contacts to present during the case review. A template for creating and presenting a case summary is included in Appendix B.

7. Document activities since last meeting

Two weeks prior to the meeting, reach out and follow up with partner agencies that were responsible for previous action items or recommendations to get a status update to share during the OFR meeting.

OFR teams should consider having a standing agenda item to provide updates on action or tasks completed since the last meeting. Documenting and sharing this information helps build in accountability of all members and subcommittees.

8. Print agendas and meeting materials

The coordinator is responsible for developing the meeting agenda with input from the OFR facilitator, if this is a different person. More information on developing an OFR meeting agenda is located in Section 3C, and a sample meeting agenda is included in Appendix C.

The coordinator will print and bring agendas, handouts, data use agreements, and any other materials needed during the OFR meeting.

Reminder:

Documents need to be saved in a secure, restricted-access folder. If copies of the summary information are distributed at the meeting, the facilitator is responsible for collecting them at the end of the meeting to ensure security and confidentiality.

agencies and for public policies affecting specific target populations, neighborhoods or communities, and/or topic areas (such as co-occurring mental illness and substance abuse).

2C. Meeting Preparation: Members' Activities

OFR members include OFR core team members and invited guests. Members may begin preparing a month prior to the review meeting.

The more prepared the members are, the more engaged they will be, resulting in a more comprehensive understanding of the incident and what could have been done to prevent it.

1. Receive and review the case information

Members will receive an email one month prior to the meeting containing the basic decedent information listed below. Most OFR meetings will cover more than one case.

Decedent information:

- Name, aliases
- Date of birth, date of death
- Demographics (age, race, sex)
- Address of residence
- Incident location, date, and time

2. Consider implications

Members will want to think about each case and any implications it might have for their organizations or

3. Identify agency's contact

Members will need to determine whether their organizations or agencies had contact with the decedents, decedents' families, or social networks, or whether they provided services to the neighborhoods where the decedents lived or where the incidents occurred.

Follow up with the OFR coordinator if more information is needed to determine whether your organization or agency had contact with or provided services to the decedent(s).

4. Prepare a summary

If a member's organization or agency had contact with someone involved in the case or the incident area, he or she should prepare a summary to verbally share during the OFR discussion.

There are no hard-and-fast rules about what information will be useful in identifying a problem and possible solutions to prevent similar overdose deaths from a systems perspective. However, preparing for the review by answering the questions provided by the coordinator, along with reading the basic decedent case information, is a good starting point.

Important:

Before you draft a summary, review the signed data sharing agreement and confidentiality forms, as well as your organization's confidentiality policies.

A member's guide to collecting case information and agency-specific data element recommendations are available in Appendix B.

Some members may choose to read a prepared summary and others may choose to read from available case file. Ideally, OFR team members will bring their summary and records to be able to reference back to during the meeting to allow additional details to become available as the discussion progresses.

5. Participate in group discussion

At the review meeting, members will want to ask questions to clarify information and timeline, identify missed opportunities or gaps in services, and suggest strategies to prevent future deaths.”

6. Take notes during the meeting

At the review meeting, it is fine to take notes of the discussion, observations, prevention activities, or strategies you want to remember for your agency. Do not document any identifying information about a case that would be considered confidential.

7. Invest in networking

Schedule your day so you can arrive early and stay a few minutes after the review to meet other team members. It is a good networking opportunity and a great way to continue the discussion with other colleagues.