

**Southern Region**  
**CQI Learning Collaborative - Convening #1**

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***Planning and Discussion Notes***

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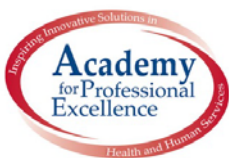
January 22, 2015

The eight counties of the Southern Consortium (Ventura, Santa Barbara, Los Angeles, Orange, San Bernardino, Riverside, San Diego, and Imperial) are in various stages of development of Continuous Quality Improvement projects and programs. Casey Family Programs and the Public Child Welfare Training Academy are collaborating to provide an opportunity to build knowledge, share information, hear from other jurisdictions, benefit from expert technical assistance, and work together to problem solve and overcome challenges through a regional collaborative process. CDSS is participating in the Learning Collaborative process to provide statewide updates and support the sharing of information and ideas across the region and state.

The process will include the following assistance and events over an 18-month period:

- Training modules
- Quarterly Learning Collaborative Meetings
- Expert Technical assistance
- Training for Trainers
- Peer Technical Assistance
- Readiness Assessment

The first convening and kick off event was held on January 22, 2015. The subsequent document provides an overview of the discussion and planning that was completed during this first convening.



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## AGREEMENTS

Learning Collaborative participants developed the following agreements to guide our work together throughout this process. These agreements are intended to be held to by the group and to be added to or modified as needed to support the group process.

- Speak one person at a time
- Be willing to share information, resource, ideas and strategies openly with one another
- Be honest about our work and support one another; expect that we will not all be starting from the same place
- Step out to respond to calls or emails as needed
- Casey Family Programs and PCWTA will work together to identify ways to support sharing of information electronically; counties will share documents to promote learning
- We will share contacts and a distribution list and remain in communication with one another in between convenings in order to keep the work moving forward
- We will continue to work and drive the process forward back at the office in our county workgroups
- We will be open to new ideas and new strategies; be willing to try on other perspectives



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## COUNTY DISCUSSION REGARDING EXISTING CQI SYSTEMS

### Orange County Planning and Preparation Discussion

Does your county currently have a defined CQI system or a current plan for implementing one? No, but there are some processes in place.

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

- Data collection and analysis: yes.
- Case reviews: yes.
- Available reports for managers and staff to review and use: yes, however it is data heavy with no explanation.
- An action planning process for using data and information to make improvements: Need to look into this further.
- Dedicated QA/CQI staff to support CQI activities: We have three liaisons, one in each division: ER, CAR, Continuing.

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?

- Capacity
- Model saturation (need for a more narrow focus and need to define more clearly how it impacts all of the functions of the agency and the different roles)
- Improved communication (open and transparent among all units)

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- Look at practice and case reviews or fatality reviews that generated policy on medical assessment and consultation
- Grand rounds that lead to training on improved court report writing and client engagement and critical thinking



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## **Los Angeles County Planning and Preparation Discussion**

Does your county currently have a defined CQI system or a current plan for implementing one? Yes. It is evolving and is not quite integrated yet.

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

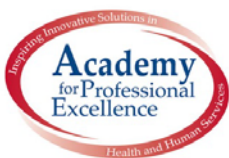
- Data collection and analysis: There is a lot of data and our collection/analysis process is evolving. We have a desire to be more focused.
- Case reviews: Quality Services Review (QSR), Data Stat/Reg Off
- Available reports for managers and staff to review and use: QSR, Monthly for Data Stat, State reports (IE: Capp, waiver, SIP)
- An action planning process for using data and information to make improvements: Need to connect/align the plans including qualitative and quantitative data. We need to consider how to make Data Stat part of work and not additional.
- Dedicated QA/CQI staff to support CQI activities: There is existing staff but we need more.

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?

- Multiple initiatives disorder posting competing demands and priorities and political pressures
- Values process – Is this helpful? Is this part of our work? How do we get to the value of CQI?
- Empowering staff to address issues/barriers to improve practice outcomes

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- SIP stakeholders group
- QSR for Katie A
- CQI teams for POE/Concurrent Planning implementation



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## **San Diego County Planning and Preparation Discussion**

Does your county currently have a defined CQI system or a current plan for implementing one? Yes, share CQI manual

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

- Data collection and analysis:
  - All staff access to Safe Measures
  - Key Data Report – each region and program pulls and reports the same consistent measures
  - Data unit – special reports and countywide data
  - Special Projects
  - DOJ Grievance data, Ombudsman reports, Operational Improvement Plans, Operations plan (county plan/budget), PB views (Countywide data system that tracks OPS and OIP goals and progress)
  - Analysis happens in DOJ grievance, ombuds and Regional CQI teams, and with OPS and OIP.
- Case reviews:
  - Developing new referral and case review tools to match practice framework (SET)
  - Have had referral and case reviews tools that are more compliance focused
  - Using 3 questions to guide feedback to supervisors, managers, and workers
  - Deep dives – high risk cases, media, ombuds
  - CQI Reviews by topic (ie: Evaluate Out review)
- Available reports for managers and staff to review and use:
  - KDR
  - Online – Executive Dashboard, Compliance Dashboard, Safety and Risk Measures Dashboard, Triangle Chart, CWS Trend Report, Monthly Children's Statistics, TDM Report, PUR, Quarterly CFSR reports
  - Regions use worker dashboard
  - 30-40 specialty reports by data unit.

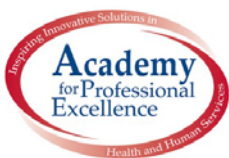
- An action planning process for using data and information to make improvements:
  - Regional CQI Teams
  - CQI Workgroup
  - CQI Steering Committee
  - Policy recommendations from CQI reports
  - SIP quarterly meetings
  - Data CQI unit meetings
  - Lean Six Sigma
  - PPS Leadership
  - Waiver Steering Committee
- Dedicated QA/CQI staff to support CQI activities:
  - Centralized CQI unit – 1 PSS, 6 SPSW
  - Regional CQI Policy Analyst – 8
  - CQI Manager
- Training
  - Basic Analytics
  - Advanced Analytics
  - Safe Measures

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?


- Moving from QA to CQI
- Managers, Sup and SWs not understanding the difference between QA and CQI
- CQI PA position without any authority
- Merging centralized CQI work with regional CQI work
- Not being seen as just out to get people
- Managing up – getting Execs to understand CQI
- Action planning
- Not slowing down and focusing on too many things at one time.

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- Changes in policy – EO policy, RHA policy



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- South Region – increase in timely reunification
- AFCARS clean-up – got data included in CFSR measures
- Regional teams developing learning circles, support for new staff
- Recognition reflecting good work
- Informed strategies chosen for the waiver
- Overall involvement of stakeholders in planning
- Relative Placement increase
- Better tracking in Residential and Adoptions



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## **San Bernardino County Planning and Preparation Discussion**

Does your county currently have a defined CQI system or a current plan for implementing one? Yes: SIP, case reviews, data analysis, business redesign

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

- Data collection and analysis: Focus groups of stakeholders, ROQS Unit/PDD, Berkeley outcome measures, CFSR measures, Safe Measures
- Case reviews: Yes, smaller in scope = slightly more compliance
- Available reports for managers and staff to review and use: Yes, data is used in reports to inform and make decisions
- An action planning process for using data and information to make improvements: Working on this; it is sometimes a challenge with regard to oversight and workgroups; current plan includes SIP, business redesign and marketing SIP to staff
- Dedicated QA/CQI staff to support CQI activities: Yes, still hiring more, ROQS unit, training unit, PDD, Sip oversight

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?

- Staff and management turn over
- Data overwhelms staff and management; difficulty prioritizing the data
- Resource constraints
- Competition for resources (EX: Katie A.)
- Training staff on this topic

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- CAPTS – changed PSSF/CAPIT, service provider system – shortened time to service
- Parent Partners – Data supported increased hiring
- Business redesign: J/D writer units, visitation centers
- E-filing of petitions
- Foster Parent Recruitment



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## **Riverside County Planning and Preparation Discussion**

Does your county currently have a defined CQI system or a current plan for implementing one? Yes.

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

- Data collection and analysis: Utilize existing data unit (pulls cases for reviews); Develop survey monkey; Developed Access Database
- Case reviews: Conducted by Assistant Regional Managers and select supervisors (10 cases, 1 referral); Regions conduct Case Quality Review (one per month); RDD reviews one case a month
- Available reports for managers and staff to review and use: Quarterly and annual reports are reviewed and distributed to executive staff and management
- An action planning process for using data and information to make improvements: Suggestions for improvements and changes are in quarterly and annual reports
- Dedicated QA/CQI staff to support CQI activities: Currently one supervisor; Resources from other units and regions are utilized; Plans for growth and expanding the unit in the next 6 months

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?

- Staffing (plans to grow in the next 6 months)
- Tool development
- System/procedure development
- Data analysis and translating to practice

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- Referral and critical incident reviews have compelled an urgent and active look at the use of warrant process
- Using penal Codes in referral conclusion
- Regions recognizing practice issues and addressing with staff



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## Ventura County Planning and Preparation Discussion

Does your county currently have a defined CQI system or a current plan for implementing one? In progress.

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

- Data collection and analysis: Good technical capacity; good data collection; moving toward automation to focus on analysis skills, communication with field and close the loop.
- Case reviews: Four rounds, not always connected to data; Strong qualitative focus, not linked to other areas (IE: training, coaching, improvement planning).
- Available reports for managers and staff to review and use: Working toward automation; Dashboards for staff to measure own performance; review what reports are utilized/needed.
- An action planning process for using data and information to make improvements: Pending – getting a baseline and setting goals with engaging all stakeholders.
- Dedicated QA/CQI staff to support CQI activities: Changing the structure to bring under one manager; Identify training needs for skill development.

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?

- Actively align systems
- Creating pressure to produce reports to help operations produce: having to slow process to focus on long term needs
- Past experience was negative; need to identify the “so, what?”

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- Sense of urgency/excitement about making connections of staff roles to larger organizational mission
- Data has not shown alignment to organizational mission which has support
- Some staff use Safe Measures; What gets measured, gets done



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## **Santa Barbara County Planning and Preparation Discussion**

Does your county currently have a defined CQI system or a current plan for implementing one? No.

Whether your County has a fully defined CQI system or not, what is your county's current capacity in the following key CQI system components:

- Data collection and analysis: PQCR, Safe Measures, QA, PP, QPI, SIP/PIP, TICP
- Qualitative case reviews: Specific program reviews
- Available reports for managers and staff to review and use: Need to identify current reports and needed reports
- An action planning process for using data and information to make improvements: Develop team; identify issues/use of data
- Dedicated QA/CQI staff to support CQI activities: Need to develop

What challenges has your County encountered in developing, implementing or sustaining an overall CQI approach or the CQI components above?

- Building the team
- Moving into action with information from data

Do you have any examples of where CQI has made a difference in your practice, outcomes, or engagement with key stakeholders?

- Not many ... working on changing our environment to one of learning
- Implementing Sop approach, follow through, sharing feedback, reinforcing learning



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## COUNTY ACTION PLANNING AND NEXT STEPS

### **Orange County Action Planning**

What are your next steps for developing a CQI system in your county?

- Review ACL by February 7
- Identify a CQI lead by February 14
- Gather a formal CQI workgroup including representation from CST, Manager, Supervisor, TCD, Deputy, Research by March 31
- Contact Gary and provide an update and get his feedback
- Disseminate the ACL and CFL

What would you need to engage county staff and stakeholders in this process?

- Engage leadership to agree on clarity of CQI messaging
- Coordinate CQI overview presentations to leadership and workgroups
- Create a common language
- Consider engagement of other stakeholders (workgroups) like the court, caretakers, youth, social workers, EFC

What support or assistance is needed moving forward?

- Training to support messaging
- Development of work group and roles of the members to support implementation
- CFP in partnership with PCWTA and Peter Watson
- Support integrating case reviews in CQI processes

### **Los Angeles County Action Planning**

What are your next steps for developing a CQI system in your county?

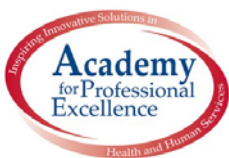
- OOA meets with SB DD's re: drilling deeper in each office (televise Data Stat; plan to tie to CPM)
- Align CFT, QSR, Data/Office Stat; Develop Break Through Series Collaborative for CQI alignment
- Reinforce structure of Data Stat, Bureau Stat, Office Stat
- Read procedural manual for CFSR

What would you need to engage county staff and stakeholders in this process?

- Develop more familiarity including training and talking about this topic at meetings
- Include stakeholders as partners in Office Stat meetings
- Watch State meeting in an office
- Have offices choose an issue that is very important to them and focus on it

What support or assistance is needed moving forward?

- None noted



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### **San Diego County Action Planning**

What are your next steps for developing a CQI system in your county?

- Focusing on structure of regional teams/how they are utilized - discuss at next CQI wrkgrp. meeting; outline roles of the regional team; (w/in 3 mos)
- Setting up group agreements - do at next CQI workgroup meeting
- Pick something and focus on that one thing - choose as a group what will be our focus by March
- Re-visit our vision of CQI - by May - CQI Workgroup; work on with managers at March Steering Committee
- What do I need to do first when I get back
- Jen - connect data to the story when training PSSs and SPSWs
- Elaine - read all materials
- Dawn - Meet with SWs and PSSs on case reviews to provide feedback
- Georgette - Plan weekly meetings to get focused on CFSR Case Review Tool
- Kim - Talk with Roseann about stakeholder

What would you need to engage county staff and stakeholders in this process?

- Contractors included
- Replicate meetings from Incredible Families

What support or assistance is needed moving forward?

- Training for CQI PAs around facilitation to lead their groups

### **San Bernardino County Action Planning**

What are your next steps for developing a CQI system in your county?

- Talk to management
- Recommend implement data and accountability workgroup from business redesign
- Implement SIP reunification case review
- Reconvene SIP focus groups on a smaller scale

What would you need to engage county staff and stakeholders in this process?

- Develop marketing plan
- Build in feedback process form staff and stakeholders
- Provide reports to stakeholders on outcomes and results of CQI
- Use current outreach venues to market CQI (such as the view, quarterly contractor meetings, staff meetings, new initiatives staff)

What support or assistance is needed moving forward?

- Funding
- Clarity on the process
- CFSR measures to be available and operationalized methodology for internal data pulls
- Training



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### **Riverside County Action Planning**

What are your next steps for developing a CQI system in your county?

- Clarify timelines
- Identify staffing needs
- Examine existing tools
- Reach out to other counties, state and NRCOI
- Engage stakeholders
- Continue research (websites, articles)

What would you need to engage county staff and stakeholders in this process?

- Meet with RM's and ARM's to get input
- Present at Suervisor's Forum to get their input
- Email/Did You Know regarding CQI
- Informing foster parents and other caregivers
- Regional meetings/presentations on this topic

What support or assistance is needed moving forward?

- Staffing
- Technical assistance

### **Ventura County Action Planning**

What are your next steps for developing a CQI system in your county?

- System in progress: applying learning through structure changes, mapping performance at all levels to the existing outcome measures, matching taff development activities to outcome goals, messaging to staff, targeting training based on needs vs. mandates
- Linking policy and org structure to support both: start hiring process for CR positions; Develop message to staff about CQI; Remain strength-based; tie message to values; Technical support to facilitate workgroup development

What would you need to engage county staff and stakeholders in this process?

- Nothing noted.

What support or assistance is needed moving forward?

- Nothing noted.

### **Santa Barbara County Action Planning**

What are your next steps for developing a CQI system in your county?

- Identify resources
- Provide introduction to team about goals/team development
- Look at what is working well (SOP) and how to build on successes

What would you need to engage county staff and stakeholders in this process?

- None noted.

What support or assistance is needed moving forward? None noted.



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## LEARNING COLLABORATIVE NEXT STEPS

The Learning Collaborative participants engaged in planning next steps and sharing their needs moving forward with this process. The following is a list of these discussion items:

- Counties would like to be clear about what the case review process will look like and who should be attending this workgroup. There was discussion about having case reviewers participate in subsequent convenings. The Southern case review training will be held on May 11-14.
- A second convening prior to the May case review training may be beneficial so counties can prepare for this training.
- Counties would like more time to report out and share information across counties in the next convening.
- We will highlight parallels from CQI to practice with families and provide research and examples of other places that have made this parallel during the development of a CQI model.
- Casey and PCWTA will work together to create an online forum for sharing resources/materials.
- PCWTA County Consultants will meet with county partners to assess need/interest in readiness assessment process.
- PCWTA and Casey will consider providing a conference call or webinar before the next convening to keep momentum going and do a check in with county partners.



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