**Southern Region**
**CQI Learning Collaborative – Convening #3**

## *Planning and Discussion Notes*

October 20, 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:
- Readiness Assessment
- Training
- Quarterly Learning Collaborative Meetings
- Webinars
- Expert Technical assistance
- Training for Trainers
- Peer Technical Assistance

The first convening and kick off event was held on January 22, 2015 which focused on providing a CQI overview and time to assess our existing CQI systems and plan for implementing a CQI model. A Webinar was held on April 21, 2015 which focused on integrating CFSR case reviews into a larger CQI model. The second convening was held on June 25, 2015 and focused on information sharing and building a message regarding CQI. The subsequent document provides an overview of the discussion and planning that was completed during the second convening. The third convening was held on October 20, 2015 and focused on supporting counties in connecting multiple sources of information to enhance CQI. This convening included a presenter who has helped implement CQI in the state of Nebraska, Doug Beran.

**COUNTY REPORT OUT REGARDING ACTION ITEMS AND NEXT STEPS**

### Orange County Action Items

- Orange County is creating a cohesive message about CFSR and CQI in general and sharing it with the workforce before case reviews actually start.
- They have presented at supervisors meetings and while this has primarily focused on case reviews, they are continuing to discuss how to ensure that they message that case reviews are not the whole of CQI – but only one part of CQI.
- Orange County held a road show event with community stakeholders to share about the CFSR process. They had a lot of questions from stakeholders and it was helpful to talk through the purpose with them.

### Los Angeles County Action Items

- They have five certified case reviewers and have additional staff going through the training at this time.
- They are attempting to reframe the case review process and all CQI processes by moving away from words like "audit" and instead focusing on practice and systems change.
- They are developing systems to get information out once a review is completed.
- They are looking at how to compile and present information from CQI efforts so that it is easy to digest and engaging.
- They are to using current meetings and forums to get the information out to staff instead of creating new meetings or groups.

### San Diego County Action Items
- The San Diego team has been conducting road shows to the regional offices to share information about CQI processes and share a strategic message about CQI.
- They are sharing about the projects they are focusing on in CQI with the regions so the workforce is aware of the areas of focus that CQI staff are attending to..

### San Bernardino County Action Items

- San Bernardino recently created a senior social worker position to support a number of different areas in workforce development. Two of these individuals will be getting certified in the case review process.

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- Currently they have one person who is certified and they are looking forward to having additional capacity.
- They have begun the case review process and are seeing that SOP is supporting active engagement with families and they are seeing best practices highlighted that seem connected to their SOP implementation.
- They are focusing on how they message the case reviews and CQI efforts so that a trusting environment is created within their staff and the team understands that the focus is on enhancing practice.

## Riverside County Action Items

- Riverside has attended regional meetings and provided "road shows" including information about the purpose of the CFSR case reviews. The goal has been to change the thinking around the CFSR and support the development of a learning culture. They are presenting the process as a dialogue and are not referring to it as an audit to minimize anxiety and worry.
- Riverside is looking at the system as a whole and how their work impacts the family as well as outcomes. This focus is helping shape how the workforce views CFSR.
- Riverside has a template for the road shows and will share it with the group.

## Ventura County Action Items

- Daniel Webster is coming to Ventura County in the next week to work with their CQI leads and continue building their CQI processes.
- They have been discussing the fact that individuals ask for a lot of data and they want to be sure that they guide their county in asking the right questions and sharing information in a way that supports changes in practice
- They have two dedicated case reviewers and one person to conduct Quality Assurance of case reviews.
- They have been messaging the purpose of case reviews and CQI with all levels of the workforce in a variety of meetings and with key external stakeholders.

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**STATEWIDE UPDATE FROM DAVE MCDOWELL, CDSS**

- Thank you for your efforts to continue messaging that case reviews do not equal CQI. It will be helpful to continue messaging this to all levels of the workforce.
- It is clear that your counties are developing a clearer sense of the case review process and that you are building capacity for this. We want to continue helping you think about how to connect all of the different sources of information so today's topic is timely.
- We are hoping to surface information through CQI and case reviews about systems change and trends in practice. The Statewide CQI Advisory Group should have the state guidelines ready to share soon.
- The structure for training is as follows: 4 day case review training, 3 coaching webinars, quality assurance training, refresher training to follow approximately 6 months after the 4 day case review training.
- Please continue messaging that there are a few reasons that CQI and case review implementation is important: qualitative case reviews help us gather information that supports practice improvement and systems change and ultimately, can help us get to better outcomes; We would like to use our own CQI system and case review process as opposed to the process of having federal representatives conduct case reviews on 65 cases from 3 jurisdictions and using this information as a representation of statewide trends that shape the CFSR results and PIP for the whole state. If we can work together to implement a successful CQI model and case reviews we will be able to continue conducting our own processes.

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**DOUG BERAN, RESAERCH PLANNING AND EVALUATION ADMIN, NEBRASKA STATE**

- Implementing CQI is about changing the culture from within an organization. It is about shifting to a culture of accountability and, as a system, caring about the work people are doing with children, youth and families.
- In order to have a culture of accountability that is successful you must have a culture of recognition.
- When he worked in the private sector he worked with Lean Six Sigma and with this model, we based our decision on facts, not feelings. When he moved into working with child welfare he modified this to: we base our decisions on facts first, and feelings second. We cannot remove feelings entirely from this work, and yet when we operate from and make decisions based on feelings we open ourselves up to bias. We need to make objective decisions based on facts.
- He shared that since developing and implementing CQI their outcomes and data related to federal outcomes have improved.
- Their goals is to get better, to improve practice and to improve systems. Whether it is through small changes or large, sweeping systems changes – the objective is to focus on improvement on a continual basis.
- They implemented a statewide monthly data meeting. This meeting is comprised of workers, supervisors, leaders, legal partners, and external stakeholders.
- They review current data reports, trends they are seeing in practice, and essentially take the information they gather from CQI processes to shape and change their system.
- They have a CQI team and their mentality is that the CQI team is not successful if those who work in the programmatic side of their organization are not successful. When they are improving practice and the system – the whole team views it as a success. This message is consistently given – it is never focused on CQI "catching someone" or a "gotcha", but instead is focused on everyone working together and transparently discussing how they can improve practice and get to better outcomes.
- They set a tone that the monthly meeting is a safe environment that is supportive of learning and systems change. They openly discuss what is working and what is not working.

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- They speak openly and transparently because they are all aware and regularly message to the workforce, "we can only address the problems we are willing to confront."
- They work from the mentality that policy answers to program and program answers to policy. This balance is helpful because it allows them to look closely at policies. If policies do not support the work that is happening in program, they can address it and adapt it – just as they would if someone in program is not adhering to policy.
- In addition to their monthly statewide meeting they have regional meetings that occur. The local CQI meetings that occur regionally have representatives that attend the statewide meeting.
- They are all responsible for determining what gets prioritized. If everything is a priority, nothing can be a priority. For this reason, they pay attention to what data they are evaluating, assess it from every angle, consider all possible solutions and ensure that the potential solutions they are considering actually address the problem at hand.
- The CQI team used a variety of strategies to shift the culture related to CQI. They use a flash light symbol regularly to message that they are shining a light on certain areas of practice. They message, "nothing grows in the dark."
- They have external stakeholders on their workgroup because they want to be transparent about their data. They have moved away from a self-preservation mentality and even though it can feel difficult to put the "bad" data out there, it has allowed them to engage the full community in the CQI process.
- Another method of holding transparency is that QA is autonomous from program. Early on they had a sense that if it was embedded in the programs it would be more challenging to transparently share all data and really shine the light on all areas of practice that needed attention. While it is separate, there is a marriage between the two. They must serve one another or they will not be working toward the common goal of practice change and system improvement.
- Another strategy they have used is to leverage data to create healthy competition. Sharing data publicly in a number of formats helps the workforce feel engaged in paying attention to their data and pushes them to want to improve.
- They use data reports, sharing data in meetings and brief videos to share successes and data regarding areas needing improvement.

- He shared there are four P's that they have focused on in their CQI implementation: Passionate, Persistent, Patience and Practice. If you attend to all four of these, you will make headway in CQI implementation.
- They have used strategies to create a culture of recognition. One strategy has been to create brief, engaging videos that share the "highlights reel" and depicts the successes they have had each quarter. Another strategy was to create a variety of awards that are given out regularly. They have a "sore knuckles" award for the individual who reached the most families in a month – they "knocked" on the most doors.
- A strategy to engage the workforce in CQI has been to report information in a number of ways in the same report. For example, in their data reports they will usually depict quantitative and qualitative data. So, they may indicate their success with a specific federal measure like timely reunification by showing the percentage of youth who reunified within 12 months. Then they will supplement that with a concrete case example of a time when a worker did something specific that helped a youth reunify within 12 months. When you can tie the outcomes to the heart of this work, you will get the attention of your workforce and the community.
- They conduct root cause analyses to assess what is causing certain trends in data. They work to not create system change until they have actually determined the cause of the trend. One way they do this well is connecting multiple sources of data.
- One tool they have is that they will do what is called a "40 day focus" – they will identify a specific topic or trend, pull the data on it and spend 40 days focusing on this specific measure. They report out on it each week, have a weekly call to discuss it, and conduct a root cause analysis. This allows them to drill down on specific issues and keep the workforce engaged.

Doug shared a variety of reports and tools they use to connect data sources and data points. Links to these tools can be found at Nebraska's website at:
- http://dhhs.ne.gov/children_family_services/Pages/CQIMonthlyReports.aspx

They are also listed on our website at:
- http://theacademy.sdsu.edu/programs/pcwta/cqi-learning-collaborative/

**ACTION PLANNING AND NEXT STEPS**

**San Diego**

- The CQI system is in place and we have a good foundation but we need to go to the next level.
- The workgroup is looking at measures and strategies to improve practice.
- They are focusing on bridging the gaps between the different programs and bridge the gap between data to better inform staff.
- They would like to draft a data book similar to Nebraska's and would want to add in the stories that go with the data

**Los Angeles**

- They need to add CQI as a standing item on agendas at a few different existing meetings.
- They would like to bring their CQI team and leadership teams together to assess where they currently are with CQI and continue planning how to build on the foundation they have.

**San Bernardino**

- They plan to meet with their leadership to discuss how to make their data reports more engaging, digestible and to include success stories. They want to continue adding to a culture of recognition.

**Orange**

- Orange is planning to discuss what to do with the feedback they are gathering from CQI tools and how to share it with the workforce so it is impacting change in practice.

**Riverside**

- They are engaging leadership in building the vision for what CQI will look like in their county.
- They shared that they have the data and are collecting information and they need to spend time in their county workgroup focusing on how it connects and overlaps so they can have a full picture of what it means. They will make this an agenda item at an upcoming meeting.

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**Imperial**

- They are planning to assess their staffing capacity. They may need additional support and will be talking with our leadership about this to support ongoing CQI.

**Ventura**

- They are discussing the culture shift and considering how they make their data work for them.
- They are discussing what data really matters so they can determine what they need to evaluate and address in practice and in their system. They will keep this as an agenda item in their workgroup meetings.
- They loved the slide on the critical components of the CQI system and are taking that slide and the information covered back to their leadership team and will use it in messaging with the broader workforce.

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