

Day Six

Part Two: Building a Highly Functional Team



TOPICS

Mentoring Through Qualitative Discussion

Team Discussion

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Part Two: Building a Highly Functional Team

Section	Time	Materials	Activities
Day 6 Introduction	15 minutes	<ul style="list-style-type: none"> ▪ PPT 6.1–6.2 	<ul style="list-style-type: none"> ▪ Safety, Permanency, and Well-Being – We All Need Them!
Mentoring Through Qualitative Discussion	4 hours & 30 minutes	<ul style="list-style-type: none"> ▪ PPT 6.3-6.79 ▪ Flipchart ▪ Markers 	<ul style="list-style-type: none"> ▪ My Mentoring Role Model ▪ My Qualitative Discussion Guide ▪ CPI Supervisory Discussion: Kizza, Jeffrey, Wesley Case Background ▪ Conducting The CPI Qualitative Discussion ▪ CASE MANAGEMENT Supervisory Discussion: Michael Case Background ▪ Conducting The CASE MANAGEMENT Qualitative Discussion ▪ Not “More” — Better!
Team Discussions	1 hour 30 minutes	<ul style="list-style-type: none"> ▪ PPT 6.80 ▪ Flipchart ▪ Markers 	<ul style="list-style-type: none"> ▪ Grand Rounds Discussion
Wrap-up	15 minutes	<ul style="list-style-type: none"> ▪ PPT 6.81 ▪ Evaluations 	<ul style="list-style-type: none"> ▪ Complete Evaluations

Day Six Introduction

Materials
PPT 6.1–6.2



15 Minutes

Presentation – Welcome Back

- ▶ Welcome back to training! I hope you are well rested from our exciting and full day of training yesterday and are ready to start on day five.
- ▶ We have a big day ahead of us, so let's get started.



Activity – Safety, Permanency, and Well-Being – We All Need Them!

INTRODUCE the Activity

- ▶ As a supervisor, it is critical that you have a commitment to improving daily frontline case practice and results.
- ▶ The ultimate reason, of course, is to improve positive outcomes for families. To provide safety, permanency and well-being for children.
- ▶ Let's explore our own feelings about this for a moment.

PURPOSE of Activity

- *Get ready for the day of training.*
- *Remind participants why improving frontline case practice and results is so important.*
- *Reinforce the importance of safety, permanency, and well-being for everyone, not just children in care.*

DIRECTIONS for Activity

- ***Refer participants to PG pages 6.4: Thinking About Safety, Permanency, and Well-Being.***



- **Divide** the group into dyads or triads, depending upon the size of the group.
- **Ask** them to discuss each question, ensuring that each participant has a chance to address each question.
- **Instruct** participants to briefly record their answers as they talk.
- **Allow** 5-10 minutes for discussion in the dyads or triads, and then conduct a large group discussion.
- **Facilitate** the discussion by asking for several responses to each question. **Address** each question, highlighting responses from the group that are similar or different from one another.

Ask:

- ? **Think about yourself as a young child. What made you feel safe?**

SAMPLE RESPONSES:

- ❖ Knowing that my parents could take care of me.
- ❖ Knowing I had people I could turn to if I was afraid or got into trouble.
- ❖ Knowing that I could trust others.

Ask:

- ? **As a child, what did belonging to a family mean to you?**

SAMPLE RESPONSES:

- ❖ Made me feel special, secure, part of something.
- ❖ Gave me my culture.
- ❖ Shaped my personality.
- ❖ Made me the person I am today.

Ask:

? **As a child, did you have a sense of well-being? If so, what gave you this security? If not, what took it away?**

SAMPLE RESPONSES:

- ❖ Yes, being part of my family.
- ❖ Yes, my parents assured me that I was safe and secure.
- ❖ Yes, I had a very happy childhood.
- ❖ No, my parents divorced when I was young.
- ❖ No, my home life was unstable.
- ❖ No, my family moved a lot.



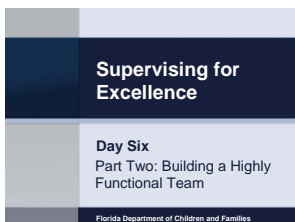
Focusing on Quality Practice =
Improved Safety, Permanency and Well Being

MAIN POINT: Why We Do What We Do

- ▶ We know what safety, permanency and well-being means to us. We know what it is like to be part of a family. We know that our families shape us and give us a future. We know that no child can thrive if s/he does not feel safe.
- ▶ By helping your team build skills in **quality practice**, you are improving safety, permanency and well-being—and isn't that what we all want? That is why we do what we do!



PowerPoint Presentation—Day Six Overview (SLIDES 6.1–6.2)



SLIDE 6.1

PowerPoint Title Slide: *Supervising for Excellence (Day 6)*



SLIDE 6.2

PowerPoint Slide: Part One—Day Six Overview

Today's topics include:

- ▶ **Mentoring Through Qualitative Discussion** during which we will:
 - ▶ Identify the **benefits** and **characteristics** of qualitative discussion.
 - ▶ Review job-specific **discussion guides**.
 - ▶ Gain **practice** conducting a qualitative discussion.
- ▶ **Team Discussions** during which we will:
 - ▶ Utilize techniques in qualitative discussion as well as listening skills, providing constructive feedback and giving praise while conducting simulation **grand-rounds**, or team, discussion.



Transition



- ▶ Yesterday we discussed how to **help case managers and investigators grow and develop** on the job through the use of effective performance management strategies. Because of the daily interaction you have with your staff, you can **dramatically affect** the learning and development of your case managers and investigators.
- ▶ Today, we are going to **specifically** address how you can dramatically impact **quality practice** and **outcomes** through effective case discussion.

Mentoring Through Qualitative Discussion

Materials

PPT 6.3-6.79



4 hours &
30 minutes

Presentation – Mentoring Through Qualitative Discussion

- ▶ During this section, we are going to explore mentoring through the use of **qualitative discussions**.
- ▶ In the midst of the sometimes almost overwhelming demands of our jobs, is it worth it to spend any of your precious time learning or strengthening mentoring skills and finding the time to use them with your staff?
- ▶ Well, research and the field work of experienced practitioners show that it definitely is! Some studies have found new staff who receive guidance and coaching from a good mentor are **twice more likely to remain in their jobs than** those who do not!
- ▶ And that's not the only benefit! Let's look more closely at some of the reasons mentoring is well worth it to you as a supervisor.

Recommended Reading

Mentoring Through Qualitative Discussion Training for Child Welfare Supervisors, Family Safety Program, Florida Department of Children and Families



PowerPoint Presentation – Benefits of Mentoring (SLIDES 6.3-6.7)



“Productive
Supervision Zone”

SLIDE 6.3

PowerPoint Slide: Benefits of Mentoring

- ▶ Mentoring is one of your **most important tools** for finding and staying in that “productive supervision zone,” which we discussed in the first week of training when we talked about moving from a super worker to a supervisor.
- ▶ Critical tool for **effectively, efficiently** helping your staff.
 - ▶ Expand and strengthen their **technical skills**.
 - ▶ Gain for themselves the **experience** and **wisdom** that you acquired during your time in the field.



SLIDE 6.4

PowerPoint Slide: Benefits of Mentoring

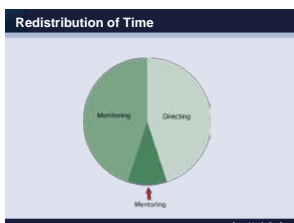
- ▶ Makes supervisors' jobs easier and helps them avoid being overwhelmed:
 - ▶ Increases the **effectiveness of interactions** with staff.
 - ▶ Staff members learn patterns of **quality practice**.
 - ▶ Staff members become more **independent and well-rounded**.



SLIDE 6.5

PowerPoint Slide: Benefits of Mentoring

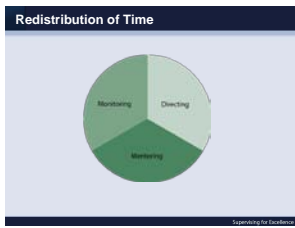
- ▶ Staff members become better **problem-solvers**.
- ▶ You and your staff **enjoy** doing your **work more**.
- ▶ Mentoring produces more **well-rounded**, more **comprehensive quality of service**.
- ▶ Mentoring strengthens staff member's **critical thinking skills**.



SLIDE 6.6

PowerPoint Slide: Benefits of Mentoring

- ▶ As supervisors, you surely want to **reduce turnover** and also **boost** the quality — the **effectiveness** and **efficiency** — of investigations and casework.
- ▶ **Strengthening** your own personal **mentoring skills** — and **specifically** the mentoring skill of **conducting qualitative discussions** — is a very effective way to accomplish this.



Not More—Better!

SLIDE 6.7

PowerPoint Slide: Benefits of Mentoring

- ▶ You don't need to spend MORE time working than you already do —
 - ▶ You just need to spend a **greater percentage** of your time on effectively mentoring your staff.
 - ▶ **Skilled supervisors** have **demonstrated** that effective mentoring will reduce the amount of time needed in **directing** and **checking**.
 - ▶ While your employees are in Developmental Level 1 (D1), you should spend more time directing and monitoring, but as their skills improve and they move toward a more independent, self-monitoring and self-directing employee, you can reduce this time and spend more time mentoring.



Activity – My Mentoring Role Model

INTRODUCE the Activity

- ▶ As we just saw, developing your expertise in the area of mentoring is worthwhile for several reasons,
- ▶ ...not the least of which is that it's one of your **most important tools** for finding and staying in that “productive supervision zone.”
- ▶ In this next activity, we'll focus on **what it means to be a good mentor**.

PURPOSE of Activity

- *Help participants relate in a personal way to the importance and value of a mentor.*
- *Engage participants in actively identifying the attributes of a mentor.*

DIRECTIONS for Activity

Ask:

- ? **Who was someone in your life — anywhere, anytime, at any point in your life — who was a good mentor — or “guide” or “coach” — for you?**



- **Refer** participants to PG pages 6.5: *My Mentoring Role Model*.
- **Allow** participants to work individually, or break into two or more small, mixed groups (CPI and Case Management supervisors in each group).
- **Give** participants 5 minutes to fill in as many responses as possible.

Explain Directions:

- ▶ Think about your mentor as you fill in as many responses as you can. You'll have 5 minutes, and then we'll record your responses on our flipchart.
 - ▶ After you've had time to think, I'll ask volunteers to briefly tell us a little bit about the **situation** in which your mentor was so important to you.
 - ▶ Describe in a word or two **what your mentor did** that was so effective in fostering your growth and success.
- **Ask** each of the questions that follow and elicit a few of the suggested responses, especially those in bold.
 - **Record** responses on flipchart.

Ask:

? **What are some of the things your mentor actively DID to help you learn and grow?**

- **Record** responses on a "T" chart as follows:

My Mentor...

DID PROVIDED

? **Record** responses on flipchart.

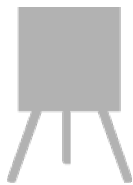
SAMPLE RESPONSES:

My mentor DID the following...

- ❖ Listened
- ❖ Was a good **role model**
- ❖ Helped me develop **critical thinking skills**
- ❖ Shared **wisdom** and **experience**
- ❖ Instilled **discipline**
- ❖ Gauged **appropriate challenges**
- ❖ Asked questions
- ❖ Met me where I was
- ❖ Helped me consider options... alternative solutions and strategies

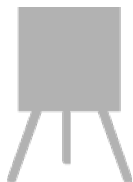
My mentor PROVIDED the following...

- ❖ **Guidance**
- ❖ **Coaching**
- ❖ **Praise**
- ❖ **Suggestions**
- ❖ Partnership
- ❖ Resources
- ❖ Information
- ❖ Direction
- ❖ Correction, re-direction



Ask:

- ? **What are some of the ways your mentor treated you that you think were effective/helpful?**



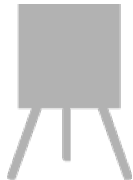
SAMPLE RESPONSES:

My mentor treated me...

- ❖ Respectfully
- ❖ Patiently
- ❖ With a sense of humor
- ❖ With kindness
- ❖ Firmly
- ❖ Fairly

Ask:

- ? **What are some synonyms for “mentor”?**



SAMPLE RESPONSES:

- ❖ Coach
- ❖ Guide
- ❖ Role model
- ❖ **Teacher**
- ❖ Resource



Coaching
Guiding
Role Model

MAIN POINT: A Critical Supervisory Skill

- ▶ So, one of your critical supervisory skills is being able to mentor staff effectively and efficiently by using an approach that includes:
 - ▶ **Coaching**
 - ▶ **Guiding**
 - ▶ Serving as a good **role model** for the ways we want our staff to, in turn, work with kids and families.
- ▶ During the remainder of this section, we are going to see what that looks like in practice—through **qualitative mentoring**.



Presentation – *Bridge* to Qualitative Mentoring

How do you

...develop critical thinking skills

- ▶ So **what do you actually DO** to be a good mentor?
 - ▶ How do you **develop your staff’s critical thinking skills** and help them gain the **experience and good judgment** they need for achieving the highest level of quality practice possible in your unit?

...build confidence and competence

- ▶ How do you give your staff the **confidence and competence** they need to make them want to **stay** in their jobs?

... reduce turnover

...keep from being overwhelmed?

- ▶ How do you find that **productive supervision zone** so you **don’t become overwhelmed** with inefficient activities such as working your staff’s cases for them rather than teaching them to achieve best practice on their own?
- ▶ One of the things you do is to **make productive use of qualitative discussions!** Let’s turn now to the meat of this training — learning how to conduct qualitative discussions effectively and efficiently.



PowerPoint Presentation – Qualitative Discussion: Definition and Benefits (SLIDES 6.8-6.19)



SLIDE 6.8

PowerPoint Slide: Qualitative Discussion: What it Is (*definition components build one by one through the next four slides*)

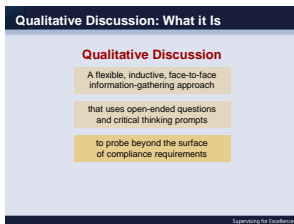
- ▶ Here’s a definition that describes, somewhat generally, what we mean by a “qualitative discussion.”
 - ▶ Qualitative Discussion is a flexible, inductive, face-to-face information-gathering approach.



SLIDE 6.9

PowerPoint Slide: Qualitative Discussion: What it Is

- ▶ that uses open-ended questions and critical thinking prompts
- ▶ And we should note here that, **although compliance is absolutely necessary, it's not sufficient.** It's only one element of quality practice.



SLIDE 6.10

PowerPoint Slide: Qualitative Discussion: What it Is

- ▶ to probe beyond the surface of compliance requirements
- ▶ We need to **move beyond the basics of compliance** and use a qualitative approach to uncover the deeper, broader, more detailed information we might not get through basic compliance checking...



SLIDE 6.11

PowerPoint Slide: Qualitative Discussion: What it Is

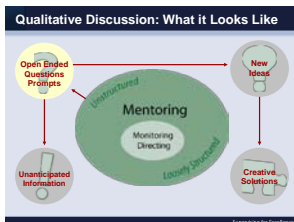
- ▶ and uncover in-depth, richly detailed information and insights.
- ▶ Information we'll need for achieving the best possible outcomes for families.
- ▶ A qualitative approach is essential because, **if you're not:**
 - ▶ In the home, bringing the plan to bear.
 - ▶ Getting services for the family.
 - ▶ Checking to see whether appropriate services are making a difference in bringing change.
 - ▶ Counseling the family, helping them to see new insights, giving them support.
 - ▶ Mentoring the family, modeling positive behavior for them.
- ▶ Then you aren't following best practices.



SLIDE 6.12

PowerPoint Slide: Qualitative Discussion: What it Looks Like

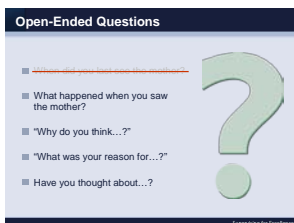
- ▶ So what does a mentoring approach— a “flexible, inductive, face-to-face information-gathering” approach—look like when you’re doing it?
- ▶ Well, there’s no formula or recipe or rigid structure. It’s more a matter of probing and exploring — of fostering an open discovery of ideas and insights.



SLIDE 6.13

PowerPoint Slide: Qualitative Discussion: What it Looks Like

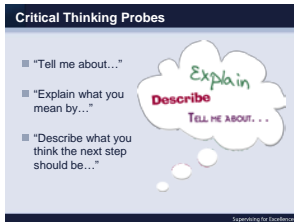
- ▶ For those of you who find a picture useful, conducting a qualitative discussion is a little like mind-mapping.
 - ▶ The person conducting it certainly has a purpose in mind. (*provide brief example*)
 - ▶ But their inquiries are flexible and intended to probe for new information and generate new ideas.
 - ▶ The discussion will very likely move from one inter-connected idea to the next.



SLIDE 6.14

PowerPoint Slide: Qualitative Mentoring: Open-Ended Questions

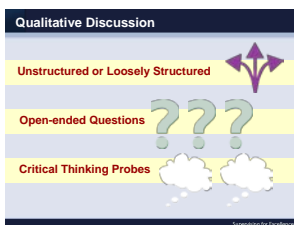
- ▶ In addition to the typical types of compliance-oriented questions and issues...
 - ▶ during a qualitative discussion, you would also observe a supervisor asking a lot of “open-ended” questions — questions that require your case manager/investigator to
 - ▶ think outside the box, and
 - ▶ talk at some length about the answer.
 - ▶ **“Closed questions”** — which can be answered with “yes” or “no” or a simple, factual answer, such as a date or time — are **too often a “dead end”** when it comes to exploring possibilities and gaining new insights.
 - ▶ (Maybe they should be called “open-end” questions and “dead-end” questions!)



SLIDE 6.15

PowerPoint Slide: Critical Thinking Prompts

- ▶ People who are skilled at conducting qualitative discussions also use a lot of “critical thinking” prompts.
- ▶ These are similar to open-ended questions; it’s just that technically they’re not “questions,” per se.
- ▶ They are requests... prompts... probes... statements that, again, require your case managers/investigators to **respond** at some length **with a richer, more detailed description** of the topic the two of you are exploring.



SLIDE 6.16

PowerPoint Slide: Qualitative Discussion

- ▶ So to summarize, what you might see if you observed someone conducting a qualitative discussion would be a **purposeful but loosely structured conversation** that included a lot of **open-ended questions** and **critical thinking prompts**.



SLIDE 6.17

PowerPoint Slide: Purpose of Qualitative Discussion

- ▶ The purpose of such discussions is to help you and your staff explore not just the “what, where and when facts” of a case, but also the **WHY** and **HOW** of what is going on with a family.
- ▶ The purpose is also to discover unanticipated information and alternatives by encouraging a free flow of ideas.
 - ▶ Dynamics
 - ▶ Strategies
 - ▶ Personalities
 - ▶ Challenges
 - ▶ Successes
- ▶ In addition, qualitative discussions help you explore the variety of **WHAT IF** options that might reveal productive “**next steps**” and make a real difference for this family.



SLIDE 6.18

PowerPoint Slide: Purpose of Qualitative Discussion

- ▶ Allows you to **model an important and effective information-gathering technique** for your staff. This is also an opportunity to **model the skill of “explaining the story”** of the case, which is a skill many staff members need to strengthen:
 - ▶ Dynamics
 - ▶ Strategies
 - ▶ Personalities
 - ▶ Challenges
 - ▶ Successes
- ▶ This **modeling is critical**, because most of your case managers/investigators will not have had the amount of experience that you've had.
- ▶ Having a qualitative discussion gives you a chance to offer the **insights** and **sound judgment** that can only be **gained from experience**,
- ▶ And gives your case managers/investigator a chance to **benefit from your experience** and grow.
- ▶ Qualitative discussions also provide you an opportunity to **assess and develop your case managers/investigators**:
 - ▶ Presentation skills
 - ▶ Social work skills
 - ▶ Policy knowledge
 - ▶ Critical thinking skills
 - ▶ Child welfare system knowledge/services
 - ▶ Documentation skills


Modeling is critical

Supervisor has experience, insights and sound judgment

Assess and develop

Benefits of Qualitative Discussion

- Fosters
 - critical thinking
 - exploration of assumptions
 - interpretation of facts
 - deeper understanding
 - enhanced perspective
- Especially valuable for investigating complex and sensitive issues
- Supports a 'productive supervision zone'
- Models the approach so staff can, in turn, use it automatically and naturally when they work with families



Supervising for Excellence

SLIDE 6.19

PowerPoint Slide: Benefits of Qualitative Discussion

- ▶ **Sometimes** just getting to the point with an **explicit directive** — a “Do this” statement — or a compliance-focused “Have you done this?” question — **is perfectly appropriate.**
- ▶ But using a qualitative approach has several important advantages.
- ▶ Helping your staff **learn to think** is just as important — perhaps more important — than telling them what to do or checking to see if they’ve done it.
- ▶ Another important benefit of qualitative discussions is that it helps you find and stay in the “**productive supervision zone.**”
- ▶ If your staff members learn to think for themselves, it’s less likely you’ll end up having to work their cases for them.
- ▶ And to reiterate what we said about an important purpose of qualitative discussions, one extremely important benefit is that you are **modeling** for your staff **an approach that they can, in turn, use productively with families** — an approach that will help them increase positive outcomes.
 - ▶ For example, the more often staff members get open-ended questions from you, the more likely they’ll use open-ended questions with families — and that will **increase the quality of the information** they get for helping families **increase positive outcomes.**



SUMMARIZE

- ▶ Hopefully it’s clear now what a qualitative discussion is, and why it’s worth your time to do it. And we have **Discussion Guides** to help you!
- ▶ Now we’re going to do an activity that will help you make your **Discussion Guides** realistic for your own specific workplace.

Trainer’s Note: Given the job-specific nature of the *Discussion Guides*, the following section of this topic is provided for both CPI and CASE MANAGEMENT audiences. If a given training audience includes both CPI and CASE MANAGEMENT supervisors, then this section is best facilitated by two trainers, including two PowerPoint projectors and, ideally, a separate break-out room.

For CPI



Activity – My Qualitative Discussion Guide

INTRODUCE the Activity

- ▶ In this activity, we’ll take each section of your *Discussion Guide* and, by viewing just a few PowerPoint slides; we’ll consider the ways in which each section of questions supports quality practice.
- ▶ Then we’ll work with the actual *Discussion Guide* documents, and analyze each section of questions in depth, examining the intent of each question to make sure everyone understands the questions and how to make best use of the Guide.
- ▶ We’ll also brainstorm some of the ways that you, personally, might adapt a question — re-phrase it, or add to it — to make it more realistic for your specific unit and staff.
- ▶ Of course, there certainly is no expectation in real life that a supervisor will ask every question in the Guide when they conduct a qualitative discussion with a staff member. However, for this activity, we’re going to look at how you might use each question.

PURPOSE of Activity

- *Help participants **become familiar and comfortable with the questions in their job-specific Guide.***
- *Build buy-in by exploring ways to **translate the questions to more accurately/completely reflect the realities of each supervisor’s situation.***
- *Build buy-in by exploring ways to overcome potential service barriers.*

DIRECTIONS for Activity



- *Refer participants to PG pages 6.6-6.8: **CPI Discussion Guide**.*

Say:

- ▶ Before we go to the PowerPoint, let's look first at just the face-sheet information that explains what the Guide is all about.
- **Review** the face-sheet information of the Discussion Guide, including the objective, underlying principle, (sampling methodology for the CPI version only), and instructions.

Ask:

- ? **What do you see as the primary purposes of a qualitative discussion?**

SAMPLE RESPONSES:

- ❖ Obtain in-depth information about whether immediate actions are necessary to protect child.
- ❖ Explore and corroborate from a variety of angles whether risk is increasing or decreasing in the case.
- ❖ Develop and strengthen the individual case managers/investigator's casework, interpersonal, and/or conceptual skills.
- ❖ Model a non-interrogatory questioning approach that gets to core issues in a non-threatening, supportive way.

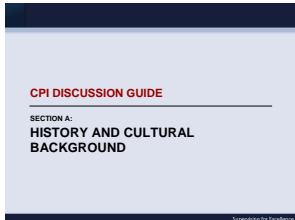
Explain:

- ▶ With those purposes in mind, let's look at just a few PowerPoint slides.
- ▶ The first section of slides corresponds to the first section of questions on your hard copy **Discussion Guide**.
 - ▶ This first section of slides addresses some important quality issues.
 - ▶ The corresponding section of your **Discussion Guide** questions is intended to help you uncover qualitative information related to those quality issues covered in the slides.

- ▶ After we review the PowerPoint slides, we'll work with the related section of questions in our Guide to make sure everyone **understands** the questions and how to **use them effectively** when holding qualitative discussions to mentor your staff.



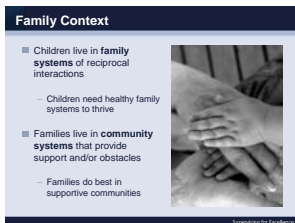
PowerPoint Presentation – CPI Discussion Guide Section A (SLIDES 6.20-6.27)



SLIDE 6.20

PowerPoint Title Slide: CPI Discussion Guide—Section A: History and Cultural Background

- ▶ **Section A** of your *Discussion Guide* gives you qualitative discussion questions related to a family's history and cultural background.



SLIDE 6.21

PowerPoint Slide: Family Context

- ▶ **Kids need families.** Families are systems. Families live in context of systems. Families live surrounded by some mix of obstacles and supports. Communities are either supportive of families, obstacles to families, or a mix thereof.



SLIDE 6.22

PowerPoint Slide: Family History and Culture

- ▶ Some of components of culture are listed here. It's important to understand the cultural and ethical assumptions of family and community. **Extended families have their own culture, and family traditions.**
- ▶ **Language is a very important issue** in Florida. In some cases, it is impossible to match a case managers/investigator with the family's language.
 - ▶ This can lead to an older child being the translator. That's a dangerous situation, because we may not get accurate information.
 - ▶ We need to develop language capability in our investigators and agency. We need to communicate in the family's language.

Family History and Culture

- Prior history, including frequent visitors and caregivers
 - Abuse/neglect
 - Domestic violence
 - Law enforcement/juvenile
 - Substance abuse
- Risks and strengths



Supervising for Excellence


SLIDE 6.23

PowerPoint Slide: Family History and Culture

- ▶ The investigator needs to **grasp the critical indicators in a family history**.
- ▶ That helps them to understand the **particular family's risk factors** and how to fix them – *the family's family system*.

Family History and Culture

- Major concerns—and **STRENGTHS!**
 - What does worker like and admire about the family?
 - What does worker like and admire about the children?



Supervising for Excellence


SLIDE 6.24

PowerPoint Slide: Family History and Culture

- ▶ Investigators need to determine the strengths and **what's working for families**.
 - ▶ We need to know more than the negative side.
- ▶ What's the potential for these parents? They are struggling, but they have a lot of hope and potential. It is equally important for the kids to know this about the parents.
- ▶ Ask the question, **what do you like about this family?**
 - ▶ If investigators don't have some liking or admiration for the family, they are not likely to do a very good job for the family.
 - ▶ If they are afraid or uncomfortable with the family, investigators might overlook important aspects of the family's culture or important supports.

Family History and Culture

- Major concerns—and **STRENGTHS!**
 - What does worker like and admire about the family?
 - What does worker like and admire about the children?
- Seeing the basic humanity in the parents and children helps communication, empathy, and understanding...and turns a "worker" into an advocate



Supervising for Excellence

SLIDE 6.25

PowerPoint Slide: Family History and Culture

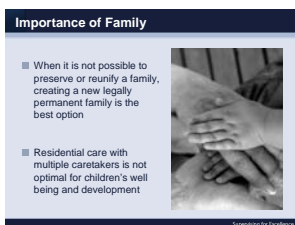
- ▶ The kids we work with have lots of potential and many strengths.
 - ▶ We need to see the **humanity in the people** we work with.
 - ▶ When we can see children and families as people, we turn a corner, and move from an investigator doing a job to being an **advocate and a champion for the family**. This starts getting the investigator focused on action.



SLIDE 6.26

PowerPoint Slide: Importance of Family

- ▶ Still, there is no purity in child welfare. There is no clear choice for safety vs. placement . . . preserve families or keep kids safe in foster care. The reality is, whether we preserve or place kids, something negative may happen.
 - ▶ Leave kids in home, gives **danger to safety**.
 - ▶ Pull means **impacts of foster care** – and danger to grow up as independent, self-sufficient adults.
 - ▶ **Either way we may have a negative impact.** It’s not as simple as safety or placement. There may be harm either way.
- ▶ When you can preserve or safely return children to their families, you **have a big win**.



SLIDE 6.27

PowerPoint Slide: Importance of Family

- ▶ When it is not possible to preserve or reunify a family, then it is important to find a good **permanent placement** . . . relatives or adoption. Adoption in 90% of cases provides a permanent family for life.



- **Refer participants to PG page 6.7: CPI Discussion Guide Section A: History And Cultural Background.**

Explain Directions:

- ▶ Keeping in mind what we’ve seen in the PowerPoint, now let’s look in depth at the corresponding section of your **Discussion Guide** questions.
 - ▶ We’re going to think about each of the questions in this section to make sure everyone understands the questions and how to use them effectively when holding qualitative discussions to mentor your staff.
- *For each section of questions in the **Discussion Guide**, the facilitator should ask participants to consider the following:*

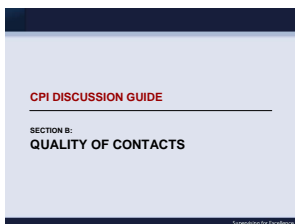
Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your investigators, **how would you re-phrase** them?
- ? What **common investigator mistakes** have you noticed with regard to this question?
- ? What **additional questions** might you ask to determine whether these **common mistakes were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question...

... and, if so, **how have you helped your staff** to deal with them?



PowerPoint Presentation – CPI Discussion Guide Section B (SLIDES 6.28-6.31)




SLIDE 6.28

PowerPoint Title Slide: CPI Discussion Guide—Section B: Quality of Contacts

- ▶ **Section B** of your **Discussion Guide** gives you qualitative discussion questions related to the **Quality of Contacts** you make for this case.

Complex System Requires Comprehensive Response

- Addresses families and their community in all critical ways needed to generate change
- Most important: Intensity and frequency of visitation sufficient to ensure safety



Supervising for Excellence

SLIDE 6.29

PowerPoint Slide: Complex System Requires Comprehensive Response

- ▶ **Bottom line:** complex systems require comprehensive responses, that can address families and communities in all the critical ways that promote change.
- ▶ **First factor for success:** Frequency and intensity of visitation to ensure safety is critical.
 - ▶ The one most important thing to the child/family is the investigator. Families often ask, “Keep coming and pushing me and getting me into programs.”
 - ▶ Follow up may be frustrating for the investigator, but it is transforming when successful.

Complex System Requires Comprehensive Response

■ Personal services	■ Hard services
- Counseling	- Income support
- Substance abuse	- Housing
- Parent training	- Food stamps
■ Support services	
- Homemakers	
- Home health	
- Day care	

Supervising for Excellence


SLIDE 6.30

PowerPoint Slide: Complex System Requires Comprehensive Response

- ▶ Also need a **continuum of care** . . . of personal services, support services, and hard services.

Complex System Requires Comprehensive Response

- Addresses families and their community in all critical ways needed to generate change
- Most important: Intensity and frequency of visitation sufficient to ensure safety



Supervising for Excellence

SLIDE 6.31

PowerPoint Slide: Quality of Visits

- ▶ **Common kid complaint:** “I don’t know my investigator well enough; I have no relationship to share real issues.”
- ▶ **Quality of visits** important to develop relationship to get trust so people can speak honestly about issues and ask personal questions.
- ▶ New investigators really need to **develop relationship for honest sharing.**



- **Refer participants to PG page 6.7: CPI Discussion Guide Section B: Quality of Contacts.**
- **For each section of questions in the Discussion Guide, the facilitator should ask participants to consider the following:**

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what questions would you add?
- ? If any of these questions need to be clearer or more relevant for your investigators, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common investigator mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff** to deal with them?

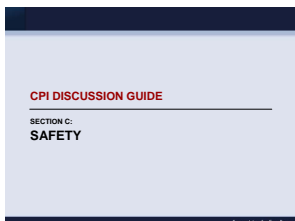


PowerPoint Presentation – CPI Discussion Guide Section C (SLIDES 6.32-6.34)

SLIDE 6.32

PowerPoint Title Slide: CPI Discussion Guide—Section C: Safety

- ▶ **Section C** of your **Discussion Guide** gives you qualitative discussion questions related to **Safety**.

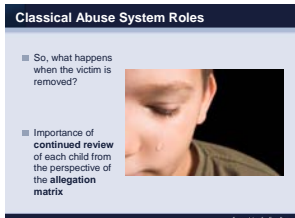


SLIDE 6.33

PowerPoint Slide: Classical Abuse System Roles

- ▶ The investigator needs to know how to be **direct** and **polite**. He or she needs to have the **self-confidence** to insist on seeing the child when parents say, for example, that he's sleeping.
 - ▶ An investigator on visits heard repeatedly that the child was always “out with grandma” but felt the family was really nice. She didn't want to upset the family, and lose the friendliness. She found out later that the child was missing.
 - ▶ Your investigators have to be **comfortable at probing**, at asking the hard questions.





SLIDE 6.34

PowerPoint Slide: Classical Abuse System Roles

- ▶ **Allegation matrix** needs to be in investigator's minds as they scan each child. Is this child OK in the perspective of the allegation matrix?
 - ▶ A lot of our staff members are not sophisticated with **developmental issues**. If a child is underweight, they need to know whether to check for failure to thrive or determine that it is a skinny kid.
 - ▶ Are your investigators cued into the clues of maltreatments?



- **Refer participants to PG page 6.7: CPI Discussion Guide Section C: Safety.**
- *For each section of questions in the **Discussion Guide**, the facilitator should ask participants to consider the following:*

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your investigators, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common investigator mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff** to deal with them?

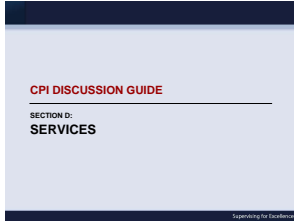


PowerPoint Presentation – CPI Discussion Guide Section D (SLIDES 6.35-6.36)

SLIDE 6.35

PowerPoint Title Slide: CPI Discussion Guide—Section D: Services

- ▶ **Section D** of your **Discussion Guide** gives you qualitative discussion questions related to identifying **Services** for this family.



SLIDE 6.36

PowerPoint Slide: Services & Permanency Goals

- ▶ **Think outside the box.** If a family says they are willing to go to church-based parenting services, rather than getting in a conflict with them and having the court choose, why not give the church effort a try and see what happens?
- ▶ We're **too quick to dismiss** what we don't know that much about.



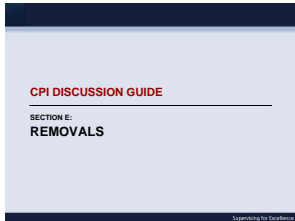
- **Refer participants to PG page 6.8: CPI Discussion Guide Part D: Identifying Services.**
- **For each section of questions in the Discussion Guide, the facilitator should ask participants to consider the following:**

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your investigators, **how would you re-phrase** them? With them?
- ? What **additional questions** might you ask to determine whether **common investigator mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff members** deal with them?



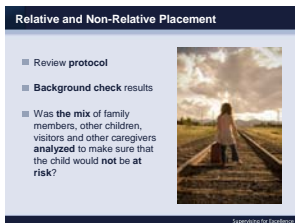
PowerPoint Presentation – CPI Discussion Guide Section E (SLIDES 6.37-6.38)



SLIDE 6.37

PowerPoint Title Slide: CPI Discussion Guide—Section E: Removals

- ▶ **Section E** of your **Discussion Guide** gives you qualitative discussion questions related to **Removals**.



SLIDE 6.38

PowerPoint Slide: Relative and Non-Relative Placement

- ▶ Are we doing a good job of understanding **who is in the home, when, what kind of supervision** is provided, the **mix of kids and visitors**? . . . important at foster home and relative placements.



- **Refer participants to PG page 6.8: CPI Discussion Guide Section E: Removals.**
- *For each section of questions in the Discussion Guide, the facilitator should ask participants to consider the following:*

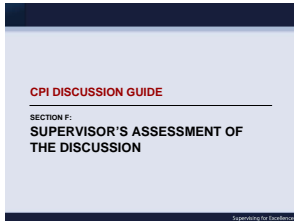
Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your investigators, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common investigator mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff members** to deal with them?



PowerPoint Presentation – CPI Discussion Guide Section F (SLIDES 6.39-6.44)

SLIDE 6.39



PowerPoint Title Slide: CPI Discussion Guide—Section F: Supervisor's Assessment of the Discussion

- ▶ **Section F** of your **Discussion Guide** gives you qualitative discussion questions related to assessing the value and effectiveness of the discussion.

SLIDE 6.40



PowerPoint Slide: What is Needed...

- ▶ Does staff really understand all the **critical dynamics** of these **complex situations and families**?
- ▶ Are they really **documenting that understanding**? Are they **crosschecking** the situation? I wouldn't go to the bank on grandmother saying everything is fine. Grandmother may be part of the system. I would want that verified and crosschecked.

SLIDE 6.41



PowerPoint Slide: What is Needed...

- ▶ What is their **ability to analyze**? Does their analysis **follow the evidence** and come to a **reasonable conclusion**?
- ▶ Given a sensible decision, does the **plan flow out of it**? Is it **comprehensive**?

SLIDE 6.42



PowerPoint Slide: What is Needed...

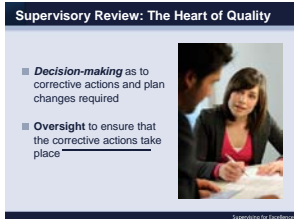
- ▶ One of the **dangers** is that our **interventions** have become very **compliance oriented** and **simplistic**:
 - ▶ Go to parent training
 - ▶ Go to 10 classes.
- ▶ Do these things and your kids are coming home.
- ▶ **But has the behavior changed?** Has the parent learned to stop hitting and be nurturing?
- ▶ **If not**, what do we need to do to improve the plan to go forward in the future?



SLIDE 6.43

PowerPoint Slide: Supervisory Review: The Heart of Quality

- ▶ **Verification** with staff that **plan is effective** and that **changes happen** as necessary to keep improvement coming—that's **the heart of the supervisor's job**.



SLIDE 6.44

PowerPoint Slide: Supervisory Review: The Heart of Quality

- ▶ **Oversight** is critical.
- ▶ Qualitative discussions can help ensure good decisions about necessary corrective actions and plan changes.



- **Refer participants to PG page 6.8: *CPI Discussion Guide Section F*.**
- *For each section of questions in the **Discussion Guide**, the facilitator should ask participants to consider the following:*

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your investigators, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common investigator mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff** to deal with them?

For CASE MANAGEMENT



Activity – My Qualitative Discussion Guide

INTRODUCE the Activity

- ▶ In this activity, we'll take each section of your **Discussion Guide** and, by viewing just a few PowerPoint slides, we'll consider the ways in which each section of questions supports quality practice.
- ▶ Then we'll work with the actual **Discussion Guide** documents, and analyze each section of questions in depth, examining the intent of each question to make sure everyone understands the questions and how to make best use of their Guide.
- ▶ We'll also brainstorm some of the ways that you, personally, might adapt a question — re-phrase it, or add to it — to make it more realistic for your specific unit and case managers/investigators.
- ▶ Of course, there certainly is no expectation in real life that a supervisor will ask every question in their Guide when they conduct a qualitative discussion with a staff member. However, for this activity, we're going to look at how you might use each question

PURPOSE of Activity

- *Help participants **become familiar and comfortable** with the questions in their job-specific Guide.*
- *Build buy-in by exploring ways to **translate the questions** to more accurately/completely reflect the realities of each supervisor's situation.*
- *Build buy-in by exploring ways to overcome potential service barriers.*

DIRECTIONS for Activity



- **Refer participants to PG pages 6.9-6.12: Case Management Discussion Guide.**

Say:

- ▶ Before we go to the PowerPoint, let's look first at just the face-sheet information that explains what the Guide is all about.
- **Review** the face-sheet information of the Discussion Guide, including the objective, underlying principle, (sampling methodology for the Case Management version only), and instructions.

Ask:

- ? **What do you see as the primary purposes of a qualitative discussion?**

SAMPLE RESPONSES:

- ❖ Obtain in-depth information about whether **immediate actions** are necessary to protect child.
- ❖ Explore and corroborate from a variety of angles whether **risk is increasing or decreasing** in the case.
- ❖ **Develop and strengthen** the individual case manager's casework, interpersonal, and/or conceptual **skills**.
- ❖ **Model** a non-interrogatory questioning approach that gets to core issues in a non-threatening, supportive way.

Explain:

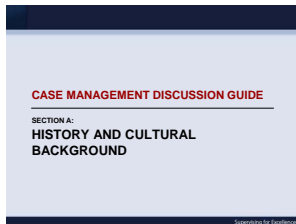
- ▶ With those purposes in mind, let's look at just a few PowerPoint slides.
- ▶ The **first section of slides corresponds** to the **first section of questions** on your hard copy Discussion Guide.
 - ▶ This first section of slides addresses some **important quality issues**.
 - ▶ The corresponding section of questions in your Guide is intended to help you **uncover qualitative information related to the quality issues** covered in the slides.
- ▶ After we review the PowerPoint slides, we'll work with the related section of questions in our Guide to make sure everyone **understands** the questions and how to **use them effectively** when holding qualitative discussions to mentor your staff.



PowerPoint Presentation – Case Management Discussion Guide Section A (SLIDES 6.45-6.52)

SLIDE 6.45

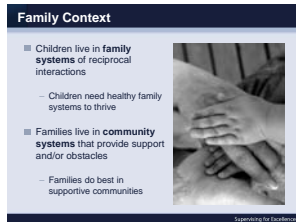
- ▶ **Section A** of your **Discussion Guide** gives you qualitative discussion questions related to a family's history and cultural background.



SLIDE 6.46

PowerPoint Slide: Family Context

- ▶ **Kids need families.** Families are systems. Families live in context of systems. Families live surrounded by some mix of obstacles and supports. Communities are either supportive of families, obstacles to families, or a mix thereof.



SLIDE 6.47

PowerPoint Slide: Family History and Culture

- ▶ Some of components of culture are listed here. It's important to understand the cultural and ethical assumptions of family and community. **Extended families have their own culture and family traditions.**
- ▶ **Language is a very important issue** in Florida. In some cases, it is impossible to match a case manager with the family's language.
 - ▶ This can lead to the older child being the translator. That's a dangerous situation, because we may not get accurate information.
 - ▶ We need to develop language capability in our case managers and agency. We need to communicate in family's language.

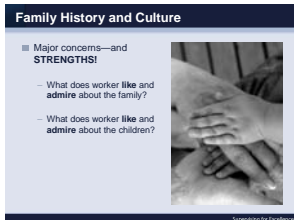


SLIDE 6.48

PowerPoint Slide: Family History and Culture

- ▶ The case manager needs to grasp the **critical indicators in a family history.**
- ▶ That helps them to understand the particular **family's risk factors** and how to fix them – the family's family system.

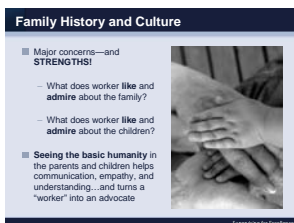




SLIDE 6.49

PowerPoint Slide: Family History and Culture

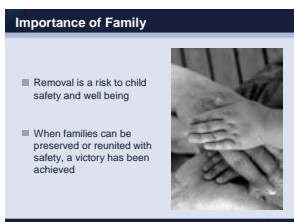
- ▶ Our case managers ought to know about the strengths and **what's working for our families.**
 - ▶ We need to know more than the negative side.
- ▶ What's the potential for these parents? They are struggling, but they have a lot of hope and potential . . . equally important with the kids to know this about the parents.
- ▶ Equally important is to start to ask the question, **what do you like about this family?**
 - ▶ If case managers don't have some liking or admiration for the family, they are not likely to do a very good job for the family.
 - ▶ If they are afraid or uncomfortable with them, they won't do well.



SLIDE 6.50

PowerPoint Slide: Family History and Culture

- ▶ The kids we work with have lots of potential and strengths.
 - ▶ We need to **see the humanity** in the people we work with.
 - ▶ When we can see child and families as people, we turn a corner, move from a case manager doing a job to being **an advocate and a champion** for the family. Starts getting the case manager focused on action.

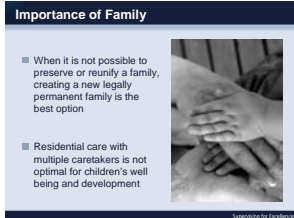


SLIDE 6.51

PowerPoint Slide: Importance of Family

- ▶ Still, there is no purity in child welfare. There is no clear choice for safety vs. placement . . . preserve families or keep kids safe in foster care. The reality is, whether we preserve or place kids, something negative may happen.
 - ▶ Leave kids in home, gives **danger to safety.**
 - ▶ Pull means **impacts of foster care** – and danger to grow up as independent, self-sufficient adults.

- ▶ **Either way we may have a negative impact.** It's not as simple as safety or placement. There may be harm either way.
- ▶ When you can preserve or safely return a kid in family, you have a big win, best options for kid.



SLIDE 6.52

PowerPoint Slide: Importance of Family

- ▶ When not possible to preserve or reunify a family, then it is good to find a good **permanent placement** . . . relatives or adoption is important. Adoption in 90% of cases provides permanent family for life.



- **Refer participants to PG page 6.10: Case Management Discussion Guide Section A: History And Cultural Background.**

Explain Directions:

- ▶ Keeping in mind what we've seen in the PowerPoint, now let's look in depth at the corresponding section of your **Discussion Guide** questions
- ▶ We're going to think about each of the questions in this section to make sure everyone understands the questions and how to use them effectively when holding qualitative discussions to mentor your staff.
- *For each section of questions in the **Discussion Guide**, the facilitator should ask participants to consider the following:*

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your case managers, **how would you re-phrase** them?
- ? What **common case manager mistakes** have you noticed with regard to this question?
- ? What **additional questions** might you ask to determine whether these **common mistakes were avoided**?

? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question...

... and, if so, **how have you helped your staff members** deal with them?

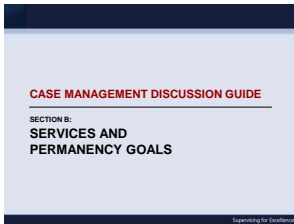


PowerPoint Presentation – Case Management Discussion Guide Section B (SLIDES 6.53-6.61)

SLIDE 6.53

PowerPoint Title Slide: Case Management Discussion Guide—
Section B: Services and Permanency Goals

- ▶ **Section B** of your *Discussion Guide* gives you qualitative discussion questions related to the **Services and Permanency Goals**.



SLIDE 6.54

PowerPoint Slide: What is Needed...

- ▶ Does staff really understand all the **critical dynamics** of these **complex situations and families**?
- ▶ Are they really **documenting that understanding**? Are they **crosschecking** the situation? I wouldn't go to the bank on grandmother saying everything is fine. Grandmother may be part of the system. I would want that verified and crosschecked.



SLIDE 6.55

PowerPoint Slide: What is Needed...

- ▶ What is their **ability to analyze**? Does their analysis **follow the evidence** and come to a **reasonable conclusion**?
- ▶ Given a sensible decision, does the **plan flow out of it**? Is it **comprehensive**?



SLIDE 6.56

PowerPoint Slide: What is Needed...

- ▶ One of the **dangers** is that our **interventions** have become very **compliance oriented** and **simplistic**:

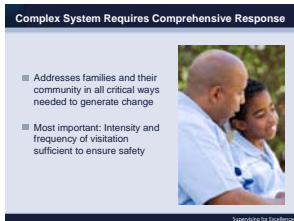


- ▶ Go to parent training
- ▶ Go to 10 classes.
- ▶ Do these things and your kids are coming home.
- ▶ **But has the behavior changed?** Has the parent learned to stop hitting and be nurturing?
- ▶ **If not**, what do we need to do to improve the plan to go forward in the future?

SLIDE 6.57

PowerPoint Slide: Complex System Requires Comprehensive Response

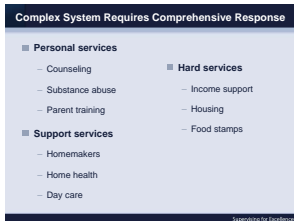
- ▶ **Bottom line:** complex systems require comprehensive responses. Something that can address families and communities in all the critical ways that promote change.
- ▶ **First factor for success:** Frequency and intensity of visitation to ensure safety is critical.
- ▶ The one most important thing to the child/family is the case manager.
 - ▶ *Keep coming and pushing me and getting me into programs.*
- ▶ Frustrating for the case manager, but transforming when successful.



SLIDE 6.58

PowerPoint Slide: Complex System Requires Comprehensive Response

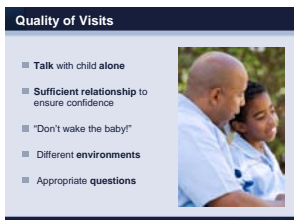
- ▶ Also need a **continuum of care** . . . of personal services, support services, and hard services.



SLIDE 6.59

PowerPoint Slide: Quality of Visits

- ▶ **Common kid complaint:** “I don’t know my case manager well enough; no relationship to share real issues.”
- ▶ **Quality of visits** important to develop relationship to get trust so people can speak honestly about issues . . . personal questions.
- ▶ New case managers really need to **develop relationship** for honest sharing.



Services & Permanency Goals

- Sufficient frequency and intensity of visitation to:
 - Develop, cross check and document needed evidentiary basis to understand the family and community system to support decision making
 - Make sure that each child (not just the alleged victim) is safe during the decision making process



Supervising for Excellence

SLIDE 6.60

PowerPoint Slide: Services and Permanency Goals

- ▶ **Think outside the box.** If a family says they are willing to go to church-based parenting services, rather than getting in a conflict with them and having the court choose, why not give the church effort a try and see what happens?
- ▶ We're too **quick to dismiss** what we don't know that much about.

Adoption

- Steps and timeline to move from setting goal to termination of parental rights
- Appropriate home selection
- Action for timely finalization
- Availability of post-adoption services and support



Supervising for Excellence

SLIDE 6.61

PowerPoint Slide: Adoption

- ▶ You know how important it is once the adoption goal gets set to keep the case moving to an adoption. Too many cases get bogged down and don't overcome the obstacles.



- **Refer participants to PG page 6.10: Case Management Discussion Guide Section B: Services and Permanency Goals.**
- **For each section of questions in the Discussion Guide, the facilitator should ask participants to consider the following:**

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what questions would you add?
- ? If any of these questions need to be clearer or more relevant for your case manager, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common case manager mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff members** to deal with them?

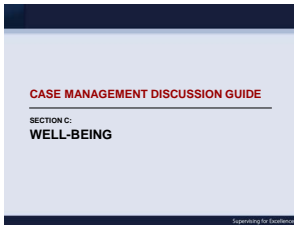


PowerPoint Presentation – Case Management Discussion Guide Section C (SLIDES 6.62-6.66)

SLIDE 6.62

PowerPoint Title Slide: Case Management Discussion Guide—Section C: Well-Being

- ▶ **Section C** of your **Discussion Guide** gives you qualitative discussion questions related to **Well-Being** of the child...



SLIDE 6.63

PowerPoint Slide: Well-being

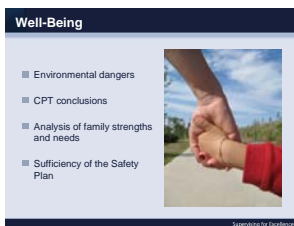
- ▶ How well versed are your staff in physical, mental, behavioral, etc. **indicators of abuse and neglect**?
- ▶ What kinds of training are they getting regarding **parents' attitude toward child, how child reacts to the parents, etc.**?



SLIDE 6.64

PowerPoint Slide: Well-being

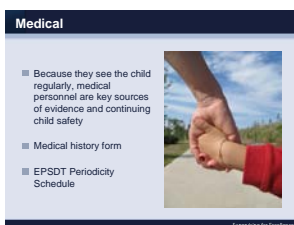
- ▶ What do you see as the **strengths and weaknesses** of their background in these areas?



SLIDE 6.65

PowerPoint Slide: Medical

- ▶ The issue of **medical care** is tremendously important for kids for a number of reasons.
- ▶ For example, when doctors are regularly involved, you have a knowledgeable person taking a look at the child, checking for bruises, psychosomatic illnesses.
- ▶ When the child is not developing properly in terms of growth charts, the doctor can notify you. They are really important support people.





SLIDE 6.66

PowerPoint Slide: Medical

- ▶ It's also really important, since our kids have more health problems than other kids – they need their **medical diagnostic screening, wellness checkups**, etc.
- ▶ In too many places, these screenings are not happening within the expected timeframes. This is dangerous from a safety perspective for the child, but such delays also may be a problem with respect to contagious diseases.



- *Refer participants to PG page 6.11: **Case Management Discussion Guide Section C: Well-Being.***
- *For each section of questions in the **Discussion Guide**, the facilitator should ask participants to consider the following:*

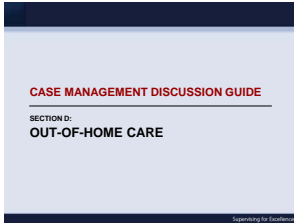
Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your case managers, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common case manager mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff members** to deal with them?



PowerPoint Presentation – Case Management Discussion Guide Section D (SLIDES 6.67-6.70)

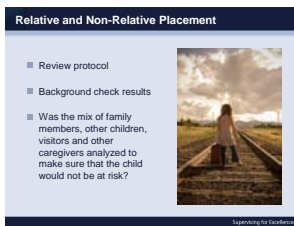
SLIDE 6.67



PowerPoint Slide: Case Management Discussion Guide—Section D: Out-of-Home Care

- ▶ **Section D** of your **Discussion Guide** gives you qualitative discussion questions related to **Out-of-Home Care** (includes placement in licensed care, relative or non-relative care).

SLIDE 6.68



PowerPoint Slide: Relative and Non-Relative Placement

- ▶ Are we doing a good job of **understanding who is in the home**:
 - ▶ When are various members of the home there?
 - ▶ What **kind of supervision** is provided?
 - ▶ What is the **mix of kids and visitors**?
- ▶ This kind of information is important at foster home and relative placements.

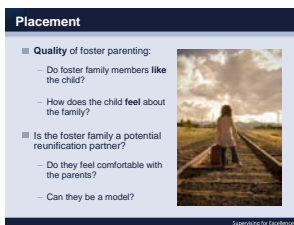
SLIDE 6.69



PowerPoint Slide: Placement

- ▶ **Clothing is more important to a child’s self-concept and well being** than many adults may realize. Make sure kids have the clothes they are entitled to.

SLIDE 6.70



PowerPoint Slide: Placement

- ▶ Did the case manager like the child, the foster parents, etc? This concern applies also to caregivers – do they like the kid?
 - ▶ **See the child’s potential?**
 - ▶ **Actively involved in reunification . . .** reunification partner with parents?
 - ▶ **How do they feel about the parents?** How does that get communicated to child?

- ▶ Too often we fail to ask the child how they like the foster parent, and whether the foster parent likes the child. Safety and a stable placement are certainly the first priorities, but sometimes we get so hung up on those critical issues that we sometimes forget about the qualitative “well-being” issues that impact this relationship.
- ▶ Think of the impact of a bad divorce . . . how parents can split a child’s loyalty. Same applies in foster care . . . need to work with foster parents to make sure they are not saying bad things about parents and show some respect for them.



- **Refer participants to PG pages 6.11-6.12: Case Management Discussion Guide Section D: Out-of-Home Care.**
- *For each section of questions in the Discussion Guide, the facilitator should ask participants to consider the following:*

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your case managers, **how would you re-phrase** them? With them?
- ? What **additional questions** might you ask to determine whether **common case manager mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff members** to deal with them?

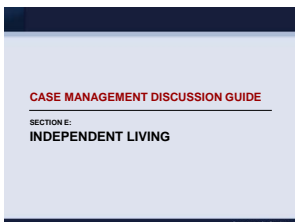


PowerPoint Presentation – Case Management Discussion Guide Section E (SLIDES 6.71-6.73)

SLIDE 6.71

PowerPoint Title Slide: Case Management Discussion Guide—
Section E: Independent Living

- ▶ **Section E** of your **Discussion Guide** gives you qualitative discussion questions related to **Independent Living**.



Transition to Independence

- Assessment and Plan
- Services delivered and effective
- The **KEY** is for the assessment and plan to drive a successful outcome at independence.



Supervising for Excellence

SLIDE 6.72

PowerPoint Slide: Transition to Independence

- ▶ Need to really make sure we know what the outcome is that we want. Consider points on slide:
 - ▶ Do they have the **clothes** they need for church, job, gym?
 - ▶ Do they have a **safe place to live**?
 - ▶ Do they have **income** . . . government benefits in place, job, etc?
 - ▶ **Health care**. . Medicare?

Transition to Independence

- Will we have achieved a successful outcome at independence?
 - All necessary clothing?
 - Safe place to live?
 - Living income?
 - Access to health care?
 - Continuing educational opportunities?
 - Continuing stable adult community mentor?



Supervising for Excellence

SLIDE 6.73

PowerPoint Slide: Transition to Independence

- ▶ Have they really developed **an anchor in the community**? A mentor . . . grandparent, minister, etc. that they can go to in time of need?
- ▶ Do we just have them hit the street or do we give them a good **strong foundation** from which they can build a successful life? How will it be sustained?



- **Refer participants to PG page 6.12: Case Management Discussion Guide Section E: Independent Living.**
- *For each section of questions in the Discussion Guide, the facilitator should ask participants to consider the following:*

Ask:

- ? What is this question intended to **reveal/address**? (Risk, risk, and risk!)
- ? Do the questions give a new supervisor **sufficient guidance**? If not, what other questions would you add?
- ? If any of these questions need to be clearer or more relevant for your case managers, **how would you re-phrase** them?
- ? What **additional questions** might you ask to determine whether **common case manager mistakes** related to this question **were avoided**?
- ? Are there common **staff or system barriers** that come into play as part of the investigation or services addressed by this question and, if so, **how have you helped your staff members** to deal with them?

Trainer's Note: If you conducted the previous activity/PowerPoint presentation in two separate groups, both groups should come back together at this time.



Presentation – Preparing for a Qualitative Discussion

- ▶ I hope we all feel comfortable now with what's in your **Discussion Guide** and how it supports quality practice.
- ▶ Now we're going to **practice actually conducting a qualitative discussion** with a case manager or investigator. To do this effectively, you should spend a little time getting prepared.
- ▶ Let's look briefly at some guidelines for **how you might prepare** for a qualitative discussion to make sure it's a productive, useful experience for you and the case managers/investigator you're meeting with.

DIRECTIONS for Presentation



- *Refer participants to PG page 6.13: Guidelines: Preparing for an Effective Qualitative Discussion.*
- *Review the following Guidelines from the Participant Guide.*
- *Emphasize that, in real life, the supervisor would, of course, customize the discussion to the case manager and case.*



From Participant Guide: Guidelines: Preparing for an Effective Qualitative Discussion

STEP 1: USE GUIDE TO REVIEW CASE

- ▶ Before an investigator or case manager meets with their supervisor to discuss a given case, s/he should study the case using the Discussion Guide as a reference. The investigator or case manager would consider the questions on the Guide and be prepared to answer those that the supervisor might ask.
- ▶ Ideally, the supervisor would also review the case using the Discussion Guide as a reference.

STEP 2: PRESENT THE CASE

- ▶ When the supervisor and investigator or case-manager meet, s/he "presents" the case to the supervisor following the framework below, as relevant:

Framework

- ▶ Core Story of the Child and Family (5-10 minutes)
- ▶ Reason for entering care
- ▶ Current status of the child and family
- ▶ Key issues relating to safety, permanency and well-being issues

- ▶ Service System Performance (5-10minutes)
- ▶ What's working, not working, and why
- ▶ Key practice issues
 - ▶ Child and family engagement
 - ▶ Breadth and scope of assessment
 - ▶ Quality of case plan
 - ▶ Composition and functioning of the service team
 - ▶ Case plan implementation and coordination issues
- ▶ Possible next steps

Ask:

- ? **Is this two-step process a reasonable reflection of what you already do in your units?**

- ? **Is there anything that you do differently, or in addition to these steps?**



- **Refer** participants to PG page 6.14: **Three Steps of the Supervisory Qualitative Discussion.**

- **Introduce** the three steps to doing a qualitative case review: *Prepare, Do, Review/Document.*



From Participant Guide: Three Steps Of The Supervisory Qualitative Discussion

STEP 1: PREPARE

- ▶ Review purposes.
- ▶ Review case materials.
- ▶ Review staff member's work behavior from a qualitative perspective, e.g., how well does he/she apply the job's technical, conceptual, interpersonal skills to achieve the best interests of the child?
- ▶ Determine focus questions, as drawn from Guide.

STEP 2: DO

- ▶ Ask for general, current "story" of the family (e.g., what's happening, what's changed, what's working well, what's not working, what's your assessment of current risk, etc.).
- ▶ Ask focus questions.
- ▶ Follow-up with additional questions to accomplish purposes.

STEP 3: REVIEW AND DOCUMENT

- ▶ Identify key casework conclusions/trends.
- ▶ Summarize current and future risk.
- ▶ Summarize investigator/case manager strengths/weak areas.
- ▶ Document in appropriate recording systems.

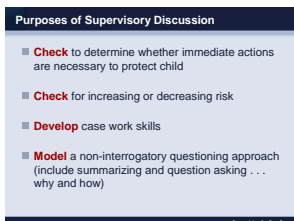


PowerPoint Presentation – Conducting A Qualitative Discussion (SLIDE 6.74)

SLIDE 6.74

PowerPoint Slide: Purposes of Supervisory Discussion

- ▶ These are the purposes you will want to accomplish through your review. Keeping these purposes in mind will help you prepare effectively for the review.
- ▶ Discuss case file review for preparation. Form your own initial opinion on case status with regard to the discussion purposes and identify apparent successes/strengths and potential problem areas.
 - ▶ For CPI, there's a list of things to review in the guide
 - ▶ For Case Management, review case file and other items as determined by your Case Management.



- ▶ Review investigator or case manager characteristics . . . types of cases he/she does well/not so well on; technical, conceptual, and interpersonal skills, organizational skills, documentation skills, etc.
- ▶ This review should remind the supervisor of the qualitative aspects of the staff member’s work: How well does he/she meet the best interests of a child? What are his/her strengths and weak areas when providing services? How may those be in evidence on the current case?
- ▶ Determine focus questions for review.



Activity – CPI Supervisory Discussion: Kizza, Jeffrey, Wesley Case Background

INTRODUCE the Activity

- ▶ Before we get started conducting a supervisory discussion, let’s walk-through the “Prepare” step.
- ▶ We will be conducting two supervisory discussions today. Our first supervisory discussion will involve a CPI case, our second a Case Management case.

PURPOSE of Activity

- *Provide participants with the background information on a CPI case to prepare for an upcoming CPI Supervisory Discussion activity.*

DIRECTIONS for Activity



- **Refer** participants to PG page 6.15: **CPI Supervisory Discussion: Kizza, Jeffrey, Wesley Case Background**. This document gives them the basic facts.
- **Give** them time to read the Case Background.
- **Check** to see if participants have any questions about the case. (More information will be revealed in the “Do” step of the role play.)

Say:

- ▶ This information is not included in the case background.
- ▶ Assume that the investigator has been on the job for about a year.
- ▶ She tends to be a rather regimented investigator, perhaps too focused on child protection rather than considering ways to help the family while protecting the child.

Focus Questions

- ▶ At this point in the case, the boys have been sheltered with the grandparents. The investigator has mainly focused on Jaime’s case, though she did interview the boys as part of that.
- ▶ In the question of where the boys should be placed, the supervisor wants more information about the boys and Kizza. Therefore, her focus questions are going to be questions 1-4 on the guide.
- ▶ Based on the responses to questions 1-4, adding the supervisor will develop other questions, as appropriate.

Trainer Note: The document entitled “CPI: Example Qualitative Discussion” is provided in the Trainer Guide appendices as background reading to prepare the trainer for the upcoming activity. You will also find a document entitled “Whole Group Role Play Description/ Guidance.” This document will give you options for conducting the role play (which are not included in the script below).



Activity – Conducting The CPI Qualitative Discussion

INTRODUCE the Activity

- ▶ Now that we’re prepared, let’s practice actually CONDUCTING an effective CPI qualitative discussion.
- ▶ We will be conducting a whole-group role play for this activity.

PURPOSE of Activity

- *Provide participants with the opportunity to practice conducting a CPI qualitative discussion.*
- *Build buy-in for the qualitative discussion process.*

DIRECTIONS for Activity

- *The trainer is encouraged to thoroughly read the following documents (see appendices) before conducting the CPI role play:*
 - *Whole Group Role Play Description/Guidance*
 - *CPI: Example Qualitative Discussion (Based on Discussion Guide Questions)*



SUMMARIZE: CPI Qualitative Discussion Role Play

- *Process what the group learned from the role plays.*

Ask:

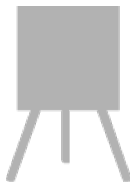
- ? **In what ways was this role play discussion different from the typical “compliance checking” discussion with an investigator?**

- *Elicit responses and briefly discuss.*

Ask:

- ? **What were some of the questions that you think would work well back in your unit to uncover in-depth or unexpected information?**

- *Elicit responses and record on a flipchart.*

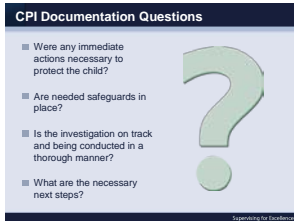


Presentation – Documenting CPI Qualitative Discussions With Case Notes

- ▶ Now you’ve had a chance to practice — or at least to simulate — the conduct of a CPI qualitative discussion, let’s work on documenting the discussion.
- ▶ Our role plays gave us a chance to practice — or at least to simulate — the conduct of a qualitative discussion.
- ▶ Following each discussion, you would document it in FSFN.
- ▶ Let’s talk about how you do that.



PowerPoint Presentation – CPI Documentation Questions (SLIDE 6.75)



SLIDE 6.75

PowerPoint Slide: CPI Documentation Questions

- ▶ For CPI supervisors, you:
 - ▶ Document that the discussion occurred.
 - ▶ Summarize the major points that may need further attention.
 - ▶ Identify potential trend characteristics to be considered in the future.
- ▶ We suggest that your documentation include the points presented on this PowerPoint slide.

Ask:

- ? **How would you document the supervisory discussion we just conducted in our role play?**
- ? **What would be the main points?**

SAMPLE RESPONSES:

- ❖ Who attended.
- ❖ Purpose: supervisory qualitative discussion.
- ❖ Child Safety: no immediate safety actions necessary; risk level low.
- ❖ Case status: Preliminary family information has been gathered and case is progressing with appropriate speed and information gathering.
- ❖ Next steps: interviews with family members; observe family interactions; contact relevant collaterals – schools, church, neighbors.

Explain

- ▶ As a supervisor, you will also want to informally assess your investigator following the discussion. This assessment should help you to develop your investigator as well as assign the most appropriate cases to him/her.
- ▶ You don't document this informal assessment in FSFN. You may keep a separate paper file with your notes or just keep the information in your head.

Ask:

- ? **What kinds of questions would you ask yourself to informally assess the investigator?**

SAMPLE RESPONSES:

- ❖ How well did they gather the necessary information for the case?
- ❖ How well do they analyze the information?
- ❖ How well do they draw appropriate conclusions?
- ❖ How well do they match services/goals to the child and family needs and characteristics?
- ❖ How well do they problem-solve when difficulties arise?
- ❖ How well do they engage the child, family, service providers, and other involved parties – seek their input, build trust, share information, etc.

Ask:

- ? **Based on our role play, what would you conclude about the investigator?**

SAMPLE RESPONSES:

- ❖ She did a pretty good job gathering information about the boys when Jaime was the focus of the investigation.
- ❖ She may have been too quick to conclude that on-going placement with the grandparents would be preferable to Kizza, but seemed open to gathering more information to make that determination

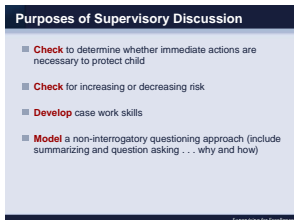


SUMMARIZE: CPI Qualitative Discussion

- ▶ We have just completed all the steps involved in conducting a Qualitative Discussion for CPI.
- ▶ Now let us get some more practice by conducting a CASE MANAGEMENT Qualitative Discussion.



PowerPoint Presentation – Case Management Qualitative Discussion (SLIDE 6.76)



SLIDE 6.76

PowerPoint Slide: Purposes of Supervisory Discussion

- ▶ As we saw earlier at the beginning of our preparations for the CPI qualitative discussion, these are the purposes you will want to accomplish through your review. Keeping these purposes in mind will help you prepare effectively for the review.
- ▶ Discuss case file review for preparation. Form your own initial opinion on case status with regard to the discussion purposes and identify apparent successes/strengths and potential problem areas.
- ▶ To check on case status, review case file and other items as determined by your Case Management.
- ▶ Review case manager characteristics . . . types of cases he/she does well/not so well on; technical, conceptual, and interpersonal skills, organizational skills, documentation skills, etc.
- ▶ This review should remind the supervisor of the qualitative aspects of the staff member's work: How well does he/she meet the best interests of a child? What are his/her strengths and weak areas when providing services? How may those be in evidence on the current case?
- ▶ Determine focus questions for review.



Activity – Case Management Supervisory Discussion: Michael Case Background

INTRODUCE the Activity

- ▶ Again, we will get started conducting a supervisory discussion, by walking through the “Prepare” step.

PURPOSE of Activity

- *Provide participants with the background information on a Case Management case to prepare for an upcoming Case Management Supervisory Discussion activity.*

DIRECTIONS for Activity



- **Refer** participants to PG page 6.16: **Case Management Supervisory Discussion: Michael Case Background**. This document gives them the basic facts.
- **Give** them time to read the Case Background.
- **Check** to see if participants have any questions about the case. (More information will be revealed in the “Do” step of the role play.)

Say:

Case manager
Characteristics

- ▶ This information is not included in the case background.
- ▶ Assume that the case manager has been on the job for about a year.
- ▶ She tends to be idealistic about the families and is a little too quick to believe whatever they tell her. She’s been “burned” by families in some cases because of this tendency, but her beliefs have also led her to accomplish some things with families that her supervisor thinks are quite remarkable.

Focus Questions

- ▶ At this point, Michael has been in care about 2.5 years and in a stable group home placement for 1.5 years. The supervisor is familiar with many of the facts of the case.
- ▶ At this point, the question of TPR is coming up. The question of whether Michael should be placed for adoption or remain in foster care with the goal of reunification with his father is the key focus question of the discussion.

- ▶ The supervisor identifies the following questions as supporting focus questions (see Discussion Guide for Case Management Supervisors):
 - ▶ 1
 - ▶ 2
 - ▶ 3
 - ▶ 4
 - ▶ 5
 - ▶ 6
 - ▶ 10

Trainer Note: The document entitled “CASE MANAGEMENT Example Qualitative Discussion” is provided in the Trainer Guide appendices as background reading to prepare the trainer for the upcoming activity. You will also find a document entitled “Whole Group Role Play Description/ Guidance.” This document will give you options for conducting the role play (which are not included in the script below).



Activity – Conducting The Case Management Qualitative Discussion

INTRODUCE the Activity

- ▶ Now that we’re prepared, let’s practice actually CONDUCTING a qualitative discussion one more time, this time focusing on a case management discussion.
- ▶ Again, we will be conducting a whole-group role play for this activity.

PURPOSE of Activity

- *Provide participants with the opportunity to practice conducting a Case Management qualitative discussion.*
- *Build buy-in for the qualitative discussion process.*

DIRECTIONS for Activity

- *The trainer is encouraged to thoroughly read the following documents (see appendices) before conducting the CPI role play:*
 - *Whole Group Role Play Description/Guidance*
 - *Case Management: Example Qualitative Discussion (Based on Discussion Guide Questions)*



SUMMARIZE: Case Management Qualitative Discussion Role Play

- *Process what the group learned from the role plays.*

Ask:

- ? **In what ways was this role play discussion different from the typical “compliance checking” discussion with a case manager?**

- *Elicit responses and briefly discuss.*

Ask:

- ? **What were some of the questions that you think would work well back in your unit to uncover in-depth or unexpected information?**

- *Elicit responses and briefly discuss.*

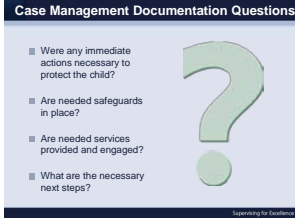


Presentation – Documenting Case Management Qualitative Discussions With Case Notes

- ▶ Now you’ve had a chance to practice — or at least to simulate — the conduct of a Case Management qualitative discussion, let’s work on documenting the discussion.
- ▶ Just as with CPI discussions, following each discussion, you would document it in FSFN.
- ▶ Let’s work on how you do that for case management.



PowerPoint Presentation – Case Management Documentation Questions (SLIDE 6.77)



SLIDE 6.77

PowerPoint Slide: Case Management Documentation Questions

- ▶ Documentation for Case Management supervisors is just like that for CPI supervisors:
 - ▶ you document that the discussion occurred,
 - ▶ summarize the major points that may need further attention, and
 - ▶ identify potential trend characteristics to be considered in the future.
- ▶ We suggest that your documentation include the points presented on this PowerPoint slide.

Ask:

- ? **How would you document the supervisory discussion we just conducted in our role play?**
- ? **What would be the main points?**

SAMPLE RESPONSES:

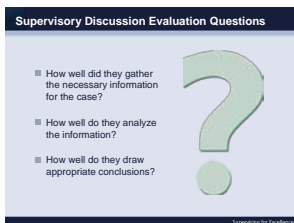
- ❖ Who attended.
- ❖ Purpose: supervisory qualitative discussion.
- ❖ Child Safety: no immediate safety actions necessary; risk level low.
- ❖ Case status: Father is still in prison. Michael and father both express preference for reunification over TPR and adoption. Michael is stable in current placement and doing well in group home, school, and counseling.
- ❖ Next steps: arrange for adoptions case manager to discuss adoption with Michael; arrange for phone call with father for case manager and Michael; request counselor delves into Michael's feelings re: adoption.

Explain

- ▶ As a Case Management supervisor, you will also want to informally assess your investigator following the discussion. This assessment should help you to develop your case manager as well as assign the most appropriate cases to him/her.
- ▶ You don't document this informal assessment in FSFN. You may keep a separate paper file with your notes or just keep the information in your head.



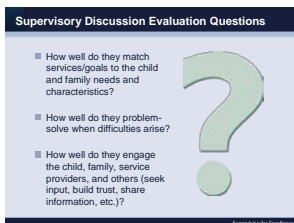
PowerPoint Presentation – Discussion Evaluation Questions (SLIDES 6.78 – 6.79)



SLIDE 6.78

PowerPoint Slide: Discussion Evaluation Questions

- ▶ Remember, these were the questions that a supervisor should ask himself/herself.



SLIDE 6.79

PowerPoint Slide: Discussion Evaluation Questions

Ask:

- ? **In our role play, what would you conclude about the case manager?**

SAMPLE RESPONSES:

- ❖ She's did a pretty good job keeping up with the case. She could have done more to get in contact with the father by phone, for herself and Michael.
- ❖ She may be too quick to conclude that Michael should be reunified with his father, given the time involved. Her quick conclusion may have closed her mind to pursuing other alternatives as well, particularly adoption.



SUMMARIZE

- ▶ Now you know what a qualitative discussion looks like, you've had a chance to practice — or at least simulate practicing — how to conduct one, and how to document one.
- ▶ The final section for this topic is going to focus on making individual plans for actually conducting qualitative discussion in the workplace.



Activity – Not “More” — Better!

INTRODUCE the Activity

- ▶ This activity will allow you to think about work tasks that you already do where you can use qualitative discussions.
- ▶ It will also give you the opportunity to brainstorm tasks you can consolidate for the purpose of improving time management and making time to conduct qualitative discussions.
- ▶ Let's get started.

PURPOSE of Activity

- *Encourage participants to use what they've learned when they return to their units.*

DIRECTIONS for Activity



- *Refer participants to PG page 6.17: **Planning For Discussions In The Workplace.***
- ***Instruct** participants to complete their plans.*
- ***Separate** into CPI and Case Management groups.*
- ***Lead** separate group discussions and record tasks on flipcharts. If a co-trainer is not available, ask for a participant to volunteer.*

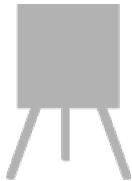
Ask:

- ? **What are two tasks you could combine to make more time available for face-to-face mentoring with your staff?**
 - ***Elicit** responses and briefly discuss.*

Ask:

- ? Think of a specific case manager in your unit who might benefit from a more focused mentoring effort from you. What are two open-ended questions you might ask to help this case manager think more broadly or creatively or in greater depth about a current case?

- *Elicit responses and briefly discuss.*



Ask:

- ? What are two questions from your Discussion Guide that you will commit to asking in your next case review discussion?

- *Elicit responses and record on a flipchart.*



SUMMARIZE

- ▶ In summary, the purpose of qualitative discussions is to help you and your staff explore not just the “what, where and when facts” of a case, but also the WHY and HOW of what is going on with a family.
- ▶ The purpose is also to discover unanticipated information and alternatives by encouraging a free flow of ideas.
- ▶ Helping your staff **learn to think** is just as important, perhaps more important, than telling them what to do or checking to see if they’ve done it. If your staff members learn to think for themselves, it’s less likely you’ll end up having to work their cases for them.
- ▶ And to reiterate what we said about an important purpose of qualitative discussions, one extremely important benefit is that you are **modeling** for your staff members an approach that they can, in turn, use productively with families — an approach that will help them increase positive outcomes.



TRANSITION

- ▶ Mentoring through qualitative discussion allows you to provide quality discussion, feedback and mentoring for your case managers or investigators during case reviews. Let’s talk about how to utilize team discussions in order to foster quality practice.

Team Discussions

Materials

PPT 6.80



1 Hour
30 Minutes

Presentation – Team Discussions

- ▶ Mentoring Through Qualitative Discussion is an excellent tool to use for both one-on-one discussions and team discussions.
- ▶ During this section of the training, we will be focusing on some of your own unique and challenging cases as we conduct **grand-rounds** discussions—or team discussions.



PowerPoint Presentation – Options for Case Discussion (SLIDE 6.80)

SLIDE 6.80

PowerPoint Slide: Options for Case Discussion

- ▶ There are two basic options for case discussion. Each has its strengths and benefits.
- ▶ The first option is a **Supervisor/Staff Discussion**
 - ▶ This involves **One-on-one** case presentation and discussion.
 - ▶ It is good for **coaching** and **individualized assistance**.
 - ▶ It is good for **initial assistance**, helps **overcome fear**.
 - ▶ It is good for dealing with **sensitive performance issues** that should be addressed in private consultation by supervisor.

Options for Case Discussion	
Supervisor/Worker	Grand-Rounds
One-on-one	Team
coaching, individualized assistance	learning across cases, collegial team partnership
initial assistance, overcome fear	group teaching, real practice situations
sensitive performance issues	pattern recognition, critical discernment, strategy selection

- ▶ The second option is Grand-Rounds Discussion
 - ▶ This involves case discussion **by team** for **group learning, problem-solving**.
 - ▶ It is good for **learning across cases** in a **collegial team partnership**.
 - ▶ It is good for **group teaching** and learning **real practice situations**.
 - ▶ It is good for learning **pattern recognition, critical discernment, strategy selection** and **developing collegial support**.



Activity – Grand Rounds Discussion

INTRODUCE the Activity

- ▶ During this activity, I am going to ask you to think of an interesting or particularly challenging case (*you should have brought summary notes and case presentation outline with you to class today*) and share this case with your “grand rounds” discussion team.
- ▶ **THIS IS IMPORTANT:** While we are using your real cases as a way to apply what you are learning to your own situation, please **DO NOT** use any ***identifying or confidential information*** about this case.

PURPOSE of Activity

- *Allow participants the opportunity to participate in a simulation grand rounds exercise.*
- *Encourage participants to use what they’ve learned about case discussion on their own cases.*

DIRECTIONS for Activity



- **Refer** participants to PG page 6.18: **Case Summary and Presentation**.
- **Divide** participants into discussion teams.
- **Explain** that everyone should have the opportunity to present a case and be the supervisor. They should also assign a note-taker and a time-keeper for each round.

Say:

- ▶ Everyone should have completed this **summary** and **case presentation** outline for homework—and you should have made a copy of each.
 - ▶ Please distribute the copies to your “supervisors.”
 - ▶ Please take the next 20 minutes to become familiar with the case you are supervising. You should take notes as necessary to help guide your discussion. You should also use your **Qualitative Discussion Guide** to help you formulate your questions and guide the discussion.
- **Allow** participants approximately 20 minutes to read their “case manager’s” case summary and prepare for the discussion.

Say:

- ▶ Now that you have read through the cases, I would like each case manager/investigator to present their case to the team.
 - ▶ The “*supervisor’s*” role is to **model quality practice** by using **qualitative discussion** techniques to guide the discussion. You should also employ effective **listening skills**, **constructive feedback** and **praise**.
 - ▶ The “*team’s*” role is to **listen** and **contribute** as appropriate.
 - ▶ The *time-keeper’s* role is to keep the discussions under 10 minutes.
 - ▶ The *note-taker’s* role is to take notes and provide to the participant at the conclusion of the activity.
- **Lead** group discussion on the benefits of team discussions

Ask:

- ? **What are some of the benefits of conducting team discussions?**

SAMPLE RESPONSES:

- ❖ Builds team support.
- ❖ Allows supervisor to teach the whole team quality practice.
- ❖ Helps new staff members solve problems in challenging cases.
- ❖ Allows case managers/investigators to gain new perspectives and other options to consider.



SUMMARIZE

- ▶ Through the use of team discussion, supervisors can further model quality practice and teach important skills to their entire team at one time.
- ▶ Team discussions allow supervisors to create an environment of learning and build a community of practice.
- ▶ By preparing for the team discussions, case managers/investigators have the opportunity to self-assess and organize their thoughts, which will lead to further discovery and problem-solving.
- ▶ Team discussions allow case managers/investigators at all developmental levels to come together and gain insight, knowledge, skills and new perspectives from one another.
- ▶ Team discussions can also address the issue of time management by improving practice and building team relationships and support.
- ▶ It is important to note that to make team discussions safe for everyone, everyone has to do it and you need to set up ground rules. This creates a culture where your team feels safe to discuss mistakes and creates the capacity to help one another.



TRANSITION

- ▶ We have had a full day of case review and as we close for the week, I want you to remember that your most important role is that of mentor. It is through your thoughtful guidance and modeling that your investigators and case managers will enhance their quality practice, bring the mission and vision of the Department into frontline practice and improve positive outcomes for families.
- ▶ Let us wrap up for the day.

Wrap Up

Materials

PPT 6.81



15 minutes



Presentation – Wrap-Up

- *Process the work day with the participants.*

Ask:

- ? **What did you learn from today's session?**
- ? **How will you integrate these new skills into your workday?**
- ? **What did you experience today that would not be useful to you as a supervisor?**

Summarize

SLIDE 6.81

- ▶ PowerPoint Slide: Thank you for participating.
- ▶ We have learned a great deal today about modeling quality practice through case discussion.
- ▶ During Part Three of the Supervising for Excellence curriculum, we will discuss the Supervisor as the Critical Link to success in the Department.
- ▶ We will also begin our project presentations. I am looking forward to seeing all of your inspirational work.
- ▶ Thanks for your input and participation and I will see you _____ (date, time, and location of the next day of training).

Evaluations

If evaluations are being used they should be distributed and completed at this time.

