

**Federal Case Reviewers' Learning Collaborative**  
2000 Franklin Street, Oakland – California Endowment  
May 10, 2018 / 10am-3pm

**Notes**

**Welcome, Introductions, Overview of the Day**

**State of the State** (Karena Brown, Jaclyn Ek)

- No PIP yet – possibly by August 2018.
- Case Review Unit @ CDSS is going through their own staffing changes – two full units. County Consultant assignments may change – there are four open positions.
- Intention for the second CDSS Case Review unit is for small counties (20 cases or less annually) to contract back with CDSS to do their case reviews (if they want).
- There will be another CQI Conference next year – dates TBD.
- CDSS provided a summary report for 2015/2016 about cases that were reviewed – question came up about whether CDSS will be providing the report again. Jaclyn will investigate, and Emily will distribute the answer.

**County Sharing: Item dilemma; something to share that would be helpful for other Case Reviewers to know; questions that have come up.**

- Alameda: now that the quarterly case review lists are rolling out regularly from CDSS, do any counties have timelines to help them determine when to stop pulling new cases to review? Inquiries take a long time.
  - Other counties agree that it's been difficult to manage.
  - SF is submitting cases into OMS before they received an answer from CDSS on Retention Inquiries. They'll write "Inquiry is pending" in the case summary.
  - Julie Cockerton and Jaclyn Ek from CDSS process all Inquiries. In general, if you can get one or two of your key participants that are non-agency participants then the case will likely be retained (ie: you need to have someone from the family, not just agency participants). This can get tricky at the end of the quarter once you've received your new list. If you're waiting for a month or longer, reach out to your County Consultant and let them know. PIP cases are prioritized.
- Marin: What is the benefit of knowing the dates of Evaluated Out cases?
  - Likely a case specific question as dates aren't typically needed. If there were multiple EOs in a short period of time, then the County Consultant might just want more information.
  - ACL on investigating new referrals on open investigations or cases- [ACL 17-27](#)

- Monterey: Currently understaffed and without a QA person and having to QA each other's cases. Has any other county experienced this?
  - Contact County Consultant to ask for support and problem solving; Sonoma had a period of time where they were submitting cases that weren't being QA'd as a way to support them during that time.
  - Suggestion to have the two Reviewers and County Consultant QA an item together to increase inter-rater reliability and have a group discussion.
  - Before all cases get QA'd, SF does a Peer QA process, which is a great opportunity to give feedback to each other in a safe setting, and for the team to learn from each other.
  - Reminder from CDSS to utilize all the resources that have been provided as an anchor for decision making. All resources can be found [here](#).
- Napa: Worker turnover has been challenging.
  - Suggestion to talk to Supervisor.
  - Lean on interviews with family and others. CASA can be a good resource.
  - If the worker still works in the county in another department, the Reviewer will reach out.
- San Francisco: Reviewing foster care case.
- San Mateo: Concerned that their sample size is too large; it's an ongoing issue and they end up eliminating a lot of cases at the beginning of the quarter. Also, not fully staffed.
  - Suggestion to process the exclusion the day the list is received.
  - If nothing has changed in two quarters, then CDSS wants you to review the case – why hasn't anything changed?
- Santa Clara: can you review the case if you were the screener who took the referral when it came in on the hotline?
  - It depends. How would the participants that you'd be interviewing perceive you? Did you make any decisions on the case? Can you be objective? In general, if there's another Reviewer available, then switch. If there's not another Reviewer available then this is not a reason to submit an Inquiry – instead, consult with your County Consultant.
- Santa Clara part 2: Referrals to ER are delayed coming from the Hotline causing a delay in investigation. So then response time for ER is delayed.
  - Use County Consultant because this is a potential safety issue.
- Santa Cruz: Item 2 dilemma. Front End isn't accurately assessing risk and safety or truly differentiating between the two. If the agency is removing because of risk versus safety and the agency did something to prevent the removal, then it is more appropriate for Item 3. Item 2 is related to safety and safety-related services provided to prevent removal or re-entry into foster care. Reviewer tried to resolve issue by responding about Item 2 in Item 3.
  - Another county faced this situation and the Reviewer rated Item 2 though the second level QA questioned whether or not the item should be rated and asked for clear identification of the safety issue. ACL for reference on safety plans and assessments [ACL 17-107](#)

- Solano: recently learned that when siblings show up on the case list, review the first case but request an exclusion for the second case (exclusion criteria #7 on the form).
- Sonoma: how do other counties balance out rating a case and staying neutral when there's a lack of documentation (contact notes are missing)?
  - Rely on interviews. Try to summarize based on the whole picture of all the interviews.
  - When the PUR is 3 months, go back before the PUR to see if there's a pattern.
  - Rely on SDM assessments.
  - Santa Cruz has worked with leadership to address the issue of missing contact notes.
  - If you're confident that the interviews did take place and they're just not documented, you can make a comment in the justification section that there wasn't documentation included but you learned x, y, z from the interview.

### **Networking Lunch**

- Lunch provided by BAA
- Case Review contact list update

### **Item 3 and 6 focused discussion** (Maria Affinito, Arturo Perez and Maryanne Rehberg)

- See scanned table group notes.
- Item 3
  - What's working well?
    - Create/Monitor safety plans, prevent re-entry
    - Informal assessments
    - Use of SDMs
    - Quality of visits
    - Collaboration with all staff and stake holders/caregivers\*
    - SOP uses 3-Houses
    - Safety mapping with families
    - CFT – Discuss safety \*
    - SDM done B4 court report is submitted
    - 90% face to face in home with kids
    - SOP, harm/danger
    - Whole networks
    - Stepdown visitation
  - What are the worries?
    - (Down Arrow) SDM ongoing \*
    - Allegations FP-EO (Ongoing Pursue)
    - Assume kids in care are safe
    - Inaccurate assessments\*
    - "Cases open too long"

- Confirmation bias with SDM
    - Conflate risk/safety
    - “Good things” (visits, CFT) not getting documented
    - Lack of accurate assessments during visits
  - What are the next steps?
    - Staff to use SDM ongoing
    - Make sure all (new) trained on new and best practices
    - Training not be the panacea
    - Pilot safety plan
    - “Do it” → document accurate assessments
- Item 6
  - What’s working well?
    - Early goals identified \*
    - CFT/Teaming
    - Courts reports timely
    - Developed concurrent plan
    - Goal achieved for younger kids
  - What are the worries?
    - Lack of follow up to goals
    - No concurrent planning
    - Court delays \*
    - Staff attrition
    - Teens harder permanency goal achieved
    - AB12, refuse guardianship and get benefits
    - Wait for status reviews to address permanent issues
  - What are the next steps?
    - “Do it” concurrent planning
    - Explain to families the difference between adoption, guardianship, access to resources

### **Closing and Next Steps**

- Create agenda for next Learning Collaborative
- Upcoming trainings
  - 4-day training dates – TBD – sponsored by the Northern Academy (flyer will be distributed once received)
  - QA training on 9/14/18 – Berkeley
- Next Learning Collaboratives
  - 8/9/18 @ Cal Endow (2000 Franklin Street, Oakland)
  - 11/7/18 @ TBD location
  - 2/5/19 @ TBD location
  - 5/8/19 @ TBD location