

Quality Service Review:

Training and Apprenticeship

The Quality Service Review is a process for learning how children and families served are doing now and which service functions are working for them so that practice improvements can be made.

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Training and Apprenticeship Program for QSR Reviewers

To become competent and effective users of the Quality Service Review (QSR) Protocol, novice reviewers participate in a developmental process that includes classroom training and supervised practice through mentored review experience(s). Training and supervised practice unfolds over successive stages of structured activities, each one of which is designed to prepare the novice for future independent review work. These stages are detailed as follows.

Classroom Instruction

► **STAGE 1: FOUNDATION AND PREPARATION. Introduction to the Quality Service Review and Practice Improvement Process.**

This stage couples classroom didactic instruction with case simulation and role play activities aimed at preparing a qualified novice with the background knowledge and experiences necessary to prepare for participation in QSR fieldwork activities. Areas of instruction covered in Stage 1 include:

- The philosophical framework for practice examination and service improvement.
- Origins and current uses of the QSR methodology.
- The QSR questions to be answered regarding the status of children and families receiving services and the performance of essential service system functions in these situations.
- QSR review methods, activities, and fieldwork schedules.
- The QSR protocol design features.
- Case simulation practice and discussion.
- Role play activities: (1) interview strategy, (2) oral case report presentation, (3) feedback to front-line staff
- Preparing the written report of QSR findings.
- General standards to be followed in conducting QSR activities.

Depending on the QSR application covered during this stage, training activities usually require from six to eight hours to complete. Training uses a combination of lectures, small group activities, and large group discussions. Stage 1 training is tailored to fit the protocol and its intended application context.

Mentored Review Experience

► **STAGE 2: OBSERVATION AND SUPERVISED PRACTICE. Shadowing an experienced reviewer during a QSR case review.**

This stage involves shadowing an experienced QSR reviewer during case review data collection activities (e.g., record review, interviewing case participants), analysis and synthesis of case review findings, oral reporting during the team debriefing, and provision of feedback to front-line staff involved in the case. In this learning situation, an experienced reviewer models the correct use of QSR tools and techniques during the course of an actual case review. The experienced reviewer also mentors the novice in two case reviews—the experienced reviewer taking the lead for the first case while the novice observes, and the novice taking the lead in the second case while the experienced reviewer acts as mentor and coach.

The inter-rater reliability check in Stage 3 is conducted concurrently with Stage 2. Most novice reviewers achieve acceptable reliability on the first case. A few novices may require a second or even a third trial case to meet the performance standards.

► **STAGE 3: DEMONSTRATING INTER-RATER RELIABILITY. Conducting an inter-rater reliability between the independently scored QSR case review findings of the novice and mentor.**

The novice reviewer is expected to meet inter-rater reliability performance standards in QSR case review as a part of the mentored review experience. In this training and quality control situation, the novice and mentor concurrently review the same case, having access to the same exact data set collected at the same point in time for a QSR case review. Working independently, the novice and mentor assemble, interpret, and score the QSR findings for the case. After independent scoring is completed, the mentor records and compares the child/family status findings and the system performance findings of the novice and mentor (using working papers provided for this purpose). The overall child/family status finding and overall system performance finding must match exactly for the case and the subset exam findings in each domain must meet or exceed 90% reliability.

The presumption of correctness of findings is given to the mentor. If, after a thorough discussion of any differences of interpretation, resolution of conflicting findings cannot be achieved, the team leader will hear oral arguments from the novice and mentor on any disputed item. The team leader's judgment of the situation is considered correct and final. The inter-rater reliability check is used primarily as a teaching and learning process as most novices meet performance standards on the first attempt. Small differences in specific examination findings in each domain provide rich opportunities for discussion and training. The reliability test serves as a readiness check for determining when a novice's judgment can be relied upon in interpreting QSR findings and conclusions.

► **STAGE 4: ORAL CASE PRESENTATION: Developing and making an oral presentation of case findings at the review team debriefing. [Micro-level analysis]**

The next training activity and performance check event requires that the novice make a concise and compelling oral summary of QSR review findings at the review team debriefing. This 10-12 minute presentation follows a prescribed summation format. Information about key circumstances and findings in the case is shared with the members of the review team. The mentor assists the novice prepare and then monitors the novice's oral presentation for style, substance, and accuracy. The mentor will make any necessary corrections, clarifications, or additions to the oral presentation during the team debriefing for the benefit of team understanding. Following the debriefing, the mentor provides feedback to the novice for performance improvement purposes. A successful oral presentation to the team is a prerequisite to providing a feedback session for front-line staff.

► **STAGE 5: TEAM ANALYSIS AND INTERPRETATION. This involves identifying and describing cross-case patterns of significance using aggregated QSR data during the review team debriefing or work session. [Macro-level analysis]**

The novice reviewer participates in the review team's assembly of local contextual information, focus group interview findings from key stakeholder groups, and patterns discovered in the cross-case analysis of QSR findings. The novice reviewer participates in the identification of local service system strengths and noteworthy accomplishments, descriptions of front-line conditions affecting practice and case results, local needs for prac-

tice development and support, specific issues of concern, and opportunities for moving ahead. This macro-level analysis and synthesis is necessary for preparing contextualized system reporting that places findings and circumstances affecting practice and results into proper perspective.

► **STAGE 6: FEEDBACK SESSION FOR LOCAL FRONT-LINE STAFF SERVING THE CHILD AND FAMILY. Conducting the oral presentation of feedback to the case worker and supervisor of cases reviewed during the QSR fieldwork activities.**

Providing feedback to the case worker, supervisor, and possibly to other front-line staff directly involved with the child and family reviewed begins the practice improvement process in the local site where the QSR review was performed. This face-to-face session requires due care in presentation to provide the focus and sensitivity necessary to create a positive reception and response by the local staff to QSR findings. Careful balance and constructiveness of tone are critically important to achieving a favorable response, even when findings are not currently positive in a case. Advice and encouragement are part of this feedback session. The reviewer must become a wise and gentle teacher in this situation. Working under the supervision of the mentor, the novice prepares for and then conducts the feedback session. Following the session, the novice's performance is critiqued by the mentor with suggestions for further improvement. This also serves as an important quality control point for reviewer development and decision making about the readiness of the novice to prepare the written report of the QSR case review.

► **STAGE 7: WRITTEN CASE SUMMARY REPORT. Preparing and submitting a written case review report that meets QSR report standards and is deemed acceptable by the mentor and team leader.**

The written report is an important aspect of the feedback and practice development processes used for front-line staff and local program managers. Conciseness, proper focus, timeliness, accuracy, adequate support for findings, balanced perspective, and constructiveness of tone are all essential criteria applied to judging the adequacy and appropriateness of the written case summary report. The novice prepares the written report in accordance with the format, content, and timeliness specifications set forth in the QSR protocol being used. The report is submitted to the mentor for verification and recommendation. Once the mentor accepts the written report from the mentor, the report is submitted to the team leader for inclusion in the final database for use in the site report and subsequent practice development work.

Once the novice has successfully completed the training and apprenticeship activities outlined above, he or she is deemed to be a qualified, or lead, reviewer. A lead reviewer is expected to demonstrate practice knowledge and skills at the Proficient Learner Level.