



# QUARTERLY REVIEW PROCESS STANDARD WORK

VERSION DATE 06/01/21

Quarterly reviews are a mechanism for organizational learning and continuous improvement of direct practice with children, parents, and families. Quarterly Reviews immediately impact child and family outcomes; provide in-the-moment coaching and education on a practice or process topic; and generate information about policy application, practice proficiency, and operational effectiveness.

## Designing the review

1. Each quarterly review's topic and goals will be selected four months prior to the review quarter.
2. Assigned members of the DCS Consultation & Research team will review each of the following and present potential quarterly review topics to the entire team.
  - a. Practice Improvement Case Review results
  - b. Safety Analysis Review Team and Systemic Critical Incident Review findings
  - c. Targeted qualitative study results
  - d. Administrative data analysis on child and family related practices, programs, services, or outcomes
  - e. Capacity, process, quality, or outcome needs that DCS Executive or Field Operations leadership has prioritized for immediate impact
  - f. Child Safety and Case Management Practice Problem Exploration Process findings
3. The Consultation & Research team will consider the topics presented and select no more than three to be presented to participants in the DCS Project Steering Committee.
4. The Project Steering Committee will consider the topics presented by Consultation & Research and select the topic and programmatic goals for the upcoming quarterly review.
5. Consultation & Research will design each quarterly review following best practices of qualitative research design. The design will include:
  - a. Research questions that contribute to the identified programmatic goals
  - b. Data collection instruments or guides, and code books if required by the review's methodology
  - c. The Quarterly Review Workbook template, adapted to each review
  - d. Instructions with the methodology and participant roles for conducting the review
  - e. Reference materials describing the pertinent policies, procedures, and practice guidelines
6. Consultation & Research will provide all instruments and materials to the Regional Program Specialist or other region employees who will conduct the review.
7. Consultation & Research will hold an orientation for those conducting the review. The orientation will provide an opportunity for those conducting the review to:
  - a. Learn about the pertinent policy, procedures, and practice guidelines
  - b. Learn the methodology and roles for the upcoming reviews, including how information will be collected and recorded
  - c. Ask questions
  - d. Set a date for a mid-point check-in and for completion of the review
8. Consultation & Research will email a communication to Program Managers and copy those conducting the review and the Program Administrators. This communication will include:
  - a. The programmatic goals for the upcoming Quarterly Review and reason for topic selection
  - b. The Roles of participants in the quarterly review, to include the roles of Program Managers and Supervisors
  - c. The date by which reviews will be completed
  - d. Documents and instructions to be used for the review

### **Conducting the review**

1. Reviews are conducted using the data collection instruments and instructions provided at orientation.
2. At the midpoint of the quarter, the Central Office Lead holds a check-in meeting for those conducting the review. This meeting focuses on:
  - a. Solving barriers reviewers have identified regarding the review process
  - b. Answering questions pertaining to policy, procedures, or practice guidelines
3. Once reviews are completed, the reviewer sends data to the Executive Consultant to the Director or designee.

### **Analyzing and presenting the results**

1. Consultation & Research analyzes the data.
2. Consultation & Research holds a review closure meeting for the reviewers to discuss:
  - a. Trends
  - b. Learning points
  - c. Barriers or needs
3. Information about trends related to immediate impact to child and family outcomes, policy application, practice proficiency, and/or operational effectiveness is provided to the Director, Deputy Director of Field Operations, and Program Administrators at a Project Steering Committee meeting.
4. During the Project Steering Committee, the Director, Deputy Director of Field Operations, and Program Administrators will identify actions and countermeasures to address system needs and improve practice, as indicated by the review results.