Outline of a VOICE Review

QA Manager

1. Collects client lists from agencies and County Case managers
2. Pulls a random sampling from the lists. That sampling consists of a minimum of 3 individuals or 5% of the total served under a specific license
3. Asks the person or a quality circle member to fill out a Basic Information Sheet for those selected.
4. A few months before the VOICE Review the QA manager sends a letter to the individual and to the circle members identified on the Basic Information Sheet. *if the family is not the guardian, this letter is not sent to them until the individual or the paid guardian has signed the consent form.
5. The VOICE Review is assigned to two Quality Assurance Team Members. When this is done all information gathered is sent to each QAT member. If the “What Adds Value sheets” have not been turned in yet, the QA Manager will send those to the QATs when they come in.

Quality Assurance Team Members

1. QAT members call each other and set up a meeting to get to know one another. They tell each other some of their background as well as their skills and interests. They share any biases they may have that might apply to serving an individual with a disability. Examples of these:
    a. “All people that have a disability must watch their weight, and if they are overweight, they should be on a diet.”
    b. “If a house is not vacuumed and completely picked up, the staff is providing poor supervision.”
    c. “You must make sure you have activities planned all of the time for an individual.”

2. QAT Members look over the What Adds Value sheets for questions they may have. They figure out if the providers are new to QA. If they are it might be best to have a preliminary meeting. If not, call the individual to make sure they are comfortable going forward without a preliminary meeting.

3. QAT members decide which tasks each are going to do. Start with making phone calls. Since you are together, you can make the calls that same day, or assign them to one of you. *I have seen in the past it is better for one person to do the scheduling. This way there isn’t overlap in scheduling the interviews and there are no assumptions made about who is calling who, and then a circle member gets missed. At the same time you make these calls, have 3 to 4 dates available of when you can do the final meeting and confirm which dates works for each circle member. Make sure you leave enough time (about 1 to 1 ½ weeks) to get your paperwork and the learning portrait completed as well as a couple days for the QA Manager to look over the write-up.

4. Once all of the interviews have been scheduled one of the QATs needs to send a letter to the Quality Circle members stating when the interviews are, who is being interviewed and where they are being interviewed. If you were able to pin down a final meeting date, put that on there as well. You can say that this date is tentative to interviews being completed and paperwork ready.

5. Conduct interviews
    d. Ride with your partner to interviews as much as possible. This gives you a chance to talk about what tasks each of you will do as well as brainstorm on learning portrait ideas. Decide ahead of time who wants to lead and who wants to take notes. If you are mentoring, you lead the first couple reviews and have your trainee lead at least one of the last interviews. Encourage the trainee to step in with follow up questions to your questions and/or ask his/her own questions.
    e. Start with small talk to put the person you are interviewing at ease. Give a copy of the 8 life area cheat sheet to the individual you are interviewing as a guide to the type of questions you will be asking.
    f. Always finish the interview asking your partner if they have any other questions, the person interviewing if they can think of anything to add, and ask the person interviewing if they have any questions on the process itself. If you had scheduled the final meeting, confirm with the person interviewed the date, time, and place. If you had not scheduled the final meeting be prepared to check schedules to get possible dates that will work.

6. Preparing the paperwork
    g. If you are mentoring, do at least some of the paperwork together. Choose at least one provider or the learning summary to write up together so the trainee gets some hands on training on how to write a finding. Then if you didn't do all of the findings together, assign out the remaining findings and check each others work for accuracy, typos, grammar, etc.
    h. If you are not mentoring, talk with your partner on their comfort level in writing findings. Split up the findings so each partner is doing some of the write up; for example, one can do the learning summary and case manager, while the other does home and work. Then check each other's work for accuracy, typos, grammar, etc.
    i. Once you are finished with the whole write up, email the QA manager so he/she can check it again. Why do you need to do this?
        i. This is to ensure understanding by someone that doesn't know anything about the individual you interviewed. Sometimes you may understand what you are writing because of background information, but it won't make much sense to someone not involved in the review.
        ii. To ensure justification for findings. We need to make sure

you have enough documentation to support the finding you are giving.

iii. To check for typos and grammar usage.

7. Completing the Learning Portrait
    j. Decide who is going to collect items for the learning portrait. Agree on a theme and who is going to make it. You can do it together.
    k. Make sure you include ALL of the write up in the learning portrait. This is the only thing you will use at the final meeting so you must cover all information.
    l. For more detail on how to do this refer to the handout “How to Create an Effective Learning Portrait”

8. Preparing for and conducting the Final meeting
    m. Make sure you confirm that meeting date, time and place with a letter sent to all of the quality circle members at least a week before the meeting. Make sure you let circle members know the person can ask anyone to this meeting. Not just those that were interviewed. If a Program Director wants to be there and the person would like that, make sure they are invited.
    n. **DO NOT** pass out the workbook to the circle when you get there. You need to make sure you have enough copies for each agency, guardian and the person, but give them out just before you are ready to leave.
    o. A basic agenda for this meeting is as follows:
        i. Introductions – even though you know everyone, there may be people the circle doesn’t see on a regular basis. Also, by doing introductions you are telling each person you are glad they are there.
        ii. Recap the review process – Start with telling the person who you interviewed, that you appreciated being able to observe home, work and wherever else. Tell the person you got together with your partner and wrote up what you observed and you will do your best here to relay that information.
        iii. Use the disclaimer – Make sure you mention that you realize you only saw a few hours of that person’s life and you did your best to see every aspect and understand things. Tell them if they feel things were perceived wrong to please let you know and then write down those notes in the final feedback notes section of the workbook.
        iv. Present the portrait – You want to engage the person so let the person choose where to start and where to go from there. A good question to ask if the person is able is “Why do you think we choose that item? Or What do you think that means for you?” Sometime the person may even share more than what you learned in the review. It may also be something other circle members didn’t know.

v. Make sure it is interactive with the person. If you are just reading notes one after the other, you more than likely are not engaging that person.

vi. Stick with your notes so you cover everything in the workbook. When the circle reads the workbook on their own, they should have heard all of it portrayed in the Learning Portrait

vii. Ask if there are any questions or comments. If someone doesn't agree tell them you will write down their concern. And thank them for the feedback. If they feel more needs to be done tell them they can call LeAnn Bieber at 775-6586.

viii. You are not there to give them guidance on action plans. Explain the quality circle brought up the concerns and if they get together to brainstorm, they will find a better solution than from you that only know a little about the person. Give them the "Responding to Action Plans" handout for guidance and tell them they can call LeAnn Bieber at 775-6586 with other questions or guidance.

ix. Thank the whole quality circle for their participation. Pass out Quality Circle feedback forms and SAS envelopes for all that participated. If someone is not there ask a circle member to get one to them or mail it to them later. Make sure you put your names or initials on them before you give them out so I know who to forward feedback to.

9. After you are finished with the review:

p. QAT partner discussions

i. Talk with your partner about the review; what went well, what didn't. If you feel comfortable discussing with your partner what you felt your strengths and improvements were for this review, do that.

ii. If you are mentoring, make sure to discuss strengths and weaknesses. This is a learning process and we all need to be open minded.

iii. If you are not able to have these discussions, please contact the QA manager with concerns you may have.

q. Paperwork

i. If you are mentoring, discuss with the trainee that they need to turn in any expenses, their timesheet and the QAT feedback form. Ask them if they need help filling these out, and if so, plan on sitting down with them to do that.

ii. When finished, turn in all of the above papers, any notes taken, papers sent at the beginning of the review, and one hard copy of the review to the QA manager. Turn in the whole folder you received as well as any of the information in the folder you did not use. Turn in letterhead and envelopes as well.

Thank you for being a part of this process!!