

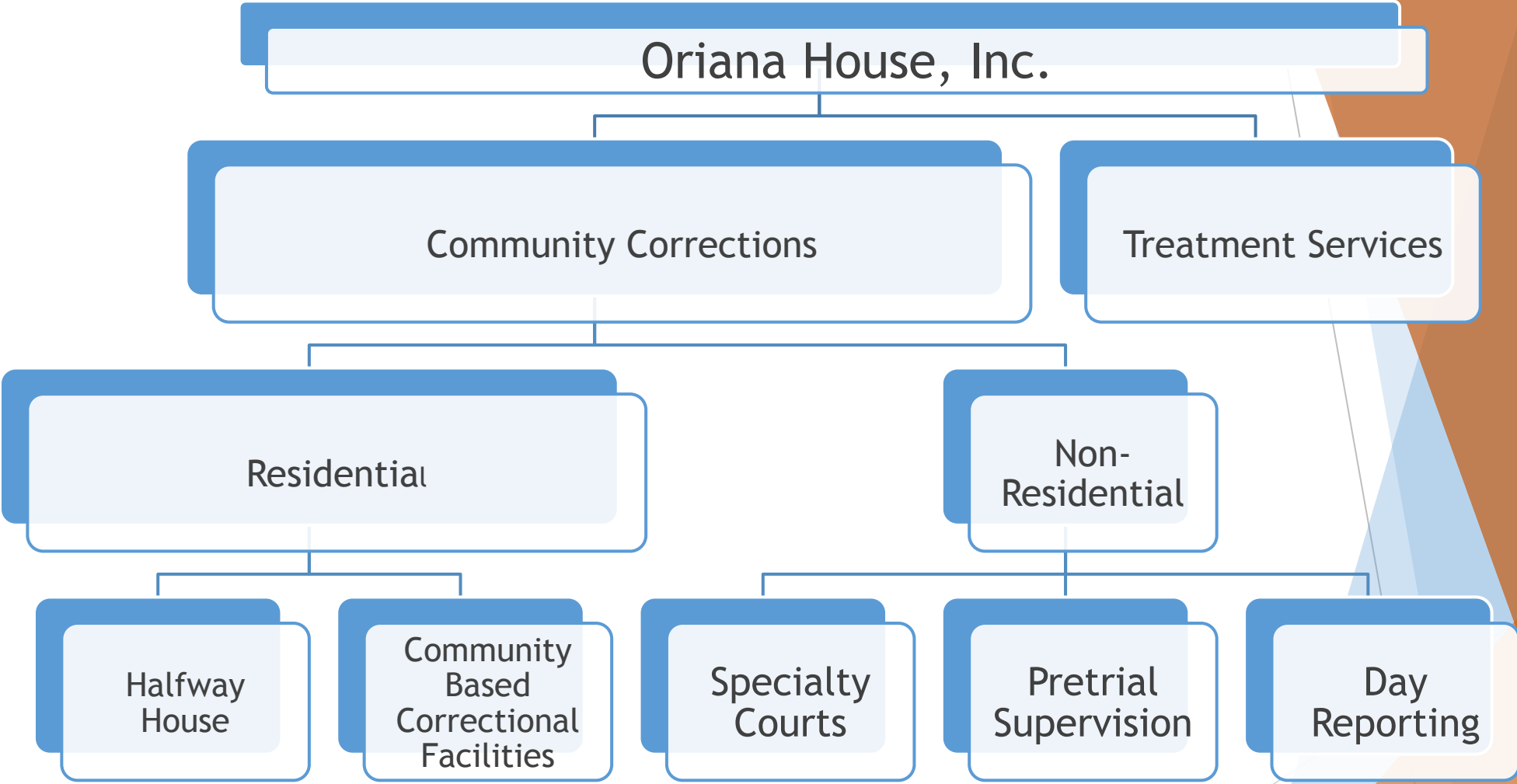
Sprouting Your Seedlings For Success: Feedback Loops and Instructions Sheets

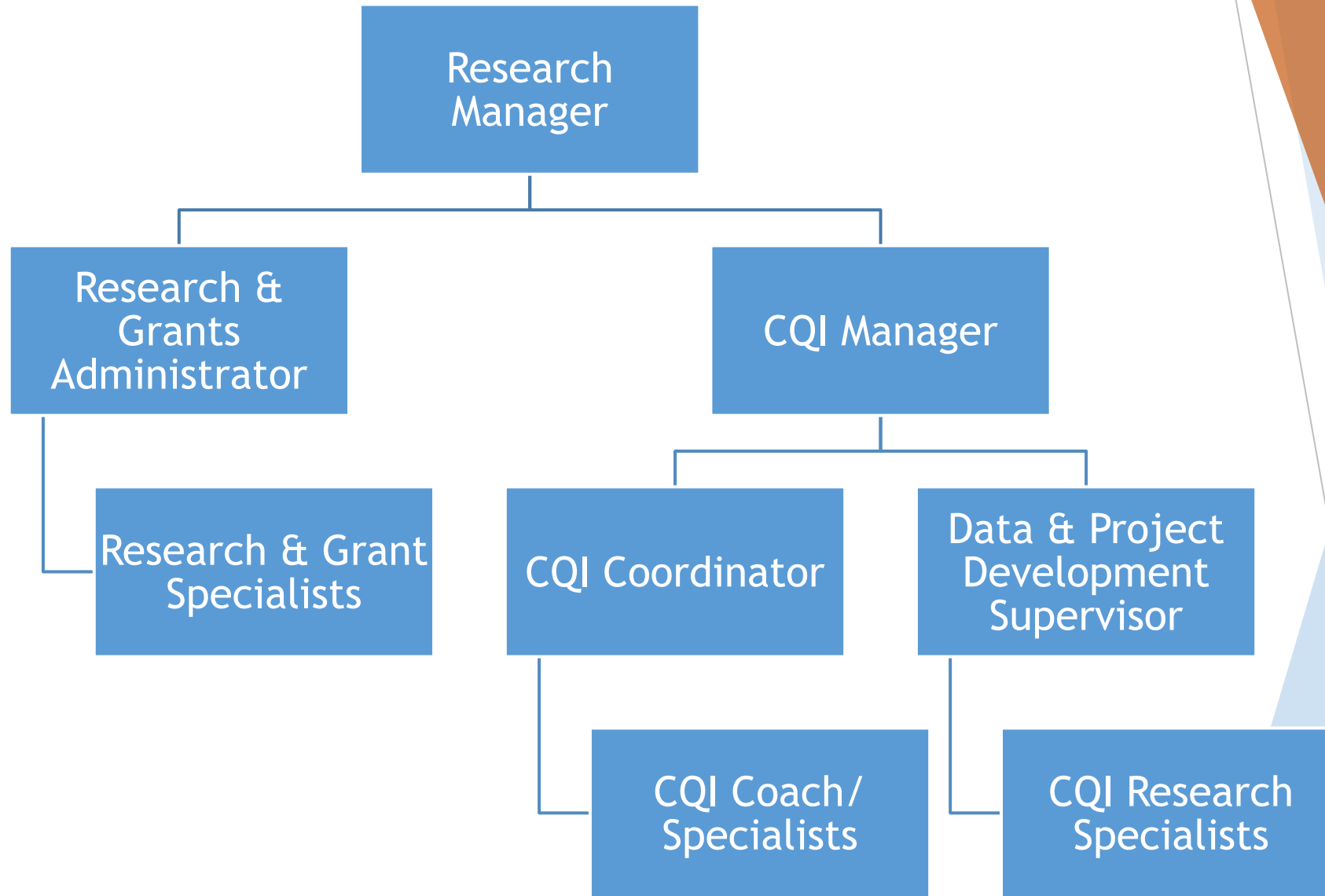
By: Valerie Keim, Elliot King, and Abby Scheck

A little about our agency

- ▶ Non-profit community corrections and substance use treatment provider
- ▶ 4 regions of Ohio
- ▶ Various programs including
 - ▶ Residential & non-residential
 - ▶ Pre & post conviction
 - ▶ Diversion to incarceration
 - ▶ Post release services







Learning Objectives

- ▶ Understand how to create different CQI processes to focus on designing a formal procedure to aid staff in confidently executing their job duties
- ▶ Tool to develop structured communication between CQI, direct care staff, and supervisors.
- ▶ See how these different techniques work to create buy-in with employees

What will be covered:

- ▶ Instruction Sheets
- ▶ Closing the feedback loop

Instruction Sheets

Instruction Sheets...

- ▶ Assist with training staff in a standardized way
- ▶ Are written to have clear expectations on a defined process
- ▶ Give fidelity across the board

Instruction Sheets Example

Taking and Tracking Training Attendance

Purpose: To ensure that training attendance is tracked in a timely and accurate manner and that the information is appropriately sent to staff and supervisors at regular intervals.

Timeframe:

- Attendance in UKG is tracked by Staff Development 48 hours after the completion of a training.
- The designated UKG system administrator will receive the report each Sunday at 11PM and forward the report to the CQI shared email by Monday at noon.
- Designee enters attendance information on the appropriate tracking spreadsheet weekly on the first day of the work week.

Definitions:

- The “week” is defined as Sunday through Saturday which reflects the regular work & pay week.
- The “designee” is defined as the CQIS who is responsible for tracking attendance per the department Division of Duties.
- The “designated UKG system administrator” is the CQI supervisor who is responsible for sending this report to the CQI shared email weekly per the department Division of Duties.
- The “report” refers to the attendance information pulled from UKG and sent to the CQI shared email by a designated UKG system administrator each week.
- A training is considered “complete” and able to be counted for credit and tracked if the percentage in the UKG report is 50% or higher.

Instructions:

1. Prior to the beginning of a training, Staff Development will send out a reminder (email or notification in UKG) with a Zoom link for the training and a separate link for staff to click to receive credit for attendance.
2. In order to receive credit for attending the training, the staff member must click on this

When writing an Instruction Sheet its good to have

- ▶ Lead (point person)
- ▶ Feedback, feedback, & more feedback
- ▶ Regular updates

Instructions Sheets need..

- ▶ The purpose
- ▶ Timeframes
- ▶ Definitions
- ▶ Instructions

Training staff with the use of Instruction Sheets

- ▶ Hands on training
- ▶ Used for reference
- ▶ Encourage Confidence
- ▶ Less need for supervisor intervention

Instruction Sheet help with...



Streamlining

Centralizing

Staff onboarding

Working independently

Sustained Change

Barriers of Instruction Sheets..

- ▶ Buy-in from staff
- ▶ Time investment
- ▶ Tracking and updating on a regular basis
- ▶ Finding a balance

Quotes from our newest CQI's:

- ▶ “I have never had any other job where there are instruction sheets for every streamlined process”- Abby Scheck, CQI/ Research Specialist
- ▶ “I like instructions sheets so I can follow them independently and refer back to for questions” - Melissa Minjarez, CQI Specialist
- ▶ “Instructions sheets are like road maps for work processes. I find that they help improve accuracy, speed and efficiency with getting tasks done.” - Hakeem Lawrence, CQI Specialist

Practice writing Instruction Sheets

- ▶ Break into groups
- ▶ Work on writing the Instruction Sheet on one of the following:
 - ▶ How to clock in
 - ▶ How to discipline an employee
 - ▶ How to call off work
 - ▶ How to submit a time off request
 - ▶ A standardized process

Closing the feedback loop

- ▶ Are you having difficulties with staff following through?



Closing the feedback loop

- ▶ Here is a quick effective tool to assist you with that!



The Issue

CQI/Supervisor Feedback Form

Employee Name:	Date of Occurrence:
-----------------------	----------------------------

Area of Concern:

Teachback/Boosters

Coaching Participation

Audio Submission/
Observations

Interpersonal Communication

Training Attendance

Logging

Other:

Actions taken previously

Dates of Previous Occurrence/Action taken:

Actions moving forward

Suggested Action:

- Address by supervisor
- Make up teachback/booster session
- Make up audios/observations
- Email supervisor weekly for 30 days with planned audios/observations
- Record all EPICS II, STEPS or CCP interactions & meet with supervisor weekly
- Re-negotiate & extend deadline
- Progressive discipline in accordance with agency policy

Other:

Supervisor Action*:

*Supervisor to document action taken and return to CQI Coach/Specialist within 5 business days. CQI maintain copy with staff paperwork. Date returned to CQI: _____

Implementing the worksheet

- ▶ Recognize the need
- ▶ Think about what you want the worksheet to address
- ▶ Get select staff input
- ▶ Introduce to supervisors/staff

Using with staff

- ▶ Try other methods (keep track)
- ▶ Use only when encountering resistance
- ▶ All other interventions were not successful

Closing the Feedback Loop Helps with...

- ▶ Staff Accountability
- ▶ Increased communication about issue
- ▶ Brainstorming other interventions

Barriers to using Closing the Feedback Loop

- ▶ All staff buy-in
- ▶ Actionable time frame
- ▶ Ever changing expectations

Example

CQI/Supervisor Feedback Form

Employee Name: John Wayne	Date of Occurrence: 4/29/22- 5/24/22
----------------------------------	---

Area of Concern:

Teachback/Boosters

Coaching Participation

Audio Submission/
Observations

Interpersonal Communication

Training Attendance

Logging

Other:

Example

Dates of Previous Occurrence/Action taken:

John completed EPICS training on 4/28/22.
CQI reached out 4/29 to discuss earning a rating. No response was received.
CQI reached out again 5/16/22. When asked if staff was ready to start audio assignments John responded with "yes". When replied to set up audio assignments and/or coaching John stopped responding again.

Suggested Action:

- Address by supervisor
- Make up teachback/booster session
- Make up audios/observations
- Email supervisor weekly for 30 days with planned audios/observations
- Record all EPICS II, STEPS or CCP interactions & meet with supervisor weekly
- Re-negotiate & extend deadline
- Progressive discipline in accordance with agency policy

Other:

Example

Supervisor Action*:

Supervisor meet with John on 6/22/22 and discussed issues.

*Supervisor to document action taken and return to CQI Coach/Specialist within 5 business days. CQI maintain copy with staff paperwork. Date returned to CQI: 6/24/22

Putting it all together

- ▶ Review the instruction sheets for Closing the Feedback loop

I  you a question.

Practice filling out a Closing the Feedback loop

- ▶ Break into groups
- ▶ Work on the top half of the worksheet on one of the following:
 - ▶ Staff not completing basic requirements
 - ▶ Staff refusing to attend training
 - ▶ Staff not responding to emails
 - ▶ Staff not participating in coaching
 - ▶ Staff not documenting correctly

Summary Slide

- ▶ Instruction sheets
- ▶ Closing the feedback loop form

Contact Information

- ▶ Valerie Keim
 - ▶ Program Coordinator
 - ▶ ValerieJKeim@orianahouse.org
- ▶ Elliot King
 - ▶ Continuous Quality Improvement Coach/Specialist
 - ▶ ElliotCKing@orianahouse.org
- ▶ Abby Scheck (in spirit)
 - ▶ Continuous Quality Improvement Coach/Specialist
 - ▶ AbbyNScheck@orianahouse.org