

**Florida Statewide Quality Assurance Program
Delmarva Foundation**

**Quarterly Report
July 1 – September 30, 2004**

**1st Quarter
Contract Year 4
2004-2005
[v2r0505]**

Attachments 1, 2, and 4

Attachment 1
Training, Education, and Liaison
Contacts and Meetings
July - September 2004

Statewide or National Presentations		
Date	Description of Activity	Participants and Audience
July 9, 2004	WiSCC Training at FASC quarterly meeting.	Bob Foley presented to 25 Waiver Support Coordinators
July 26, 2004	Overview and Project Update to the Blue Ribbon Task Force	Members of the Blue Ribbon Task Force, Special Invited guests; APD staff and others (30+ attendees)
August 5, 2004	Discussion with Consumer Directed Care representatives to discuss integration with WiSCC.	Bob, Terri McGarrity, Karen Huber, etc.
August 9, 2004	Presentation at the Annual NASDDDS Reinventing Quality National Conference in Philadelphia, PA entitled "Using Multiple Data Sources"	Presented by Marcia Hill; attendees included Bob Foley and Linda Mabile; audience included about 35 professionals and advocates from several states
August 18, 2004	Meeting with Maximus to discuss topics of joint interest.	Bob, Marion, etc., Linda Mabile, etc. (See Marion)
August 23, 2004	Meeting with ARC/FL to discuss new review processes	Marcia Hill, Marion Olivier-Reulas, Deborah Linton
September 2, 2004	Consumer Directed Care presentation at the WiSCC weekly conference call.	CDC representatives and Delmarva consultants, managers, and support staff.

District/local contacts		
Date	Description of Activity	Participants and Audience
District 1		
July 12,2004	Formal Training Session “How to Prepare for a Desk Review”	Marion Olivier-Ruelas & Susan VonFossum provided training for 50 Desk Review Providers in Pensacola.
August 19, 2004	Quarterly Meeting	Marion Olivier-Ruelas, Sharon Searcy, and 8 district staff. Reviewed the CORE and WiSCC process and discussed the latest quarterly data.
August 21, 2004	Formal Training Session “Evaluating Services using My Personal Compass”	Susan deBeaugrine, Nilda Barretto and Joan Batzloff facilitated a training and luncheon for 22 consumers, family members and provider staff in Milton, Florida.
August 31, 2004	Formal Training 2 sessions “Overview of CORE”	Marion Olivier-Ruelas & Carol McDuff provided training for 149 core provider staff
District 2		
August 31, 2004	Meeting with Office of Public Guardian to provide overview of PCR process and use of Personal Outcome Measures	Anne Buechner, Susan deBeaugrine, Marcia Hill, Polly Yates and 4 staff members from OPG
October 5, 2004	Quarterly Meeting – Had to be rescheduled from 9/13/04 due to inclement weather	Marion Olivier-Ruelas, Susan DeBeaugrine, and 9 district staff. Reviewed the CORE and WiSCC process and discussed the latest quarterly data.
District 3		
September 20, 2004	Quarterly Meeting	Marion Olivier-Ruelas, Christine Stevenson, Theresa Skidmore and 7 district staff. Reviewed the CORE and WiSCC process and discussed the latest quarterly data.

District/local contacts		
Date	Description of Activity	Participants and Audience
District 4		
August 21, 2004	Formal Training 2 sessions “Overview of CORE and WiSCC”	Bob Foley & Marion Olivier-Ruelas provided training for 71 provider and district staff
September 21, 2004	Quarterly Meeting	Marion Olivier-Ruelas and 10 district staff. Reviewed the CORE and WiSCC process and discussed the latest quarterly data.
District 7		
July 15, 2004	Training session provided to Family Care Council “Overview of WiSCC”	Presentation to the FCC (@5 members present), Individuals receiving services (@ 7 Individuals present), and Providers (@ 30 Providers present) on the WiSCC and CORE process. Presented by Bob Foley and Carol McDuff. David Heindel also attended.
August 18, 2004	Quarterly Meeting	Cancelled due to hurricane. Reschedule
September 8, 2004	Quarterly Meeting	Cancelled due to hurricane.
1 st Quarter	Quarterly Meeting	

District/local contacts		
Date	Description of Activity	Participants and Audience
District 8		
September 7, 2004	Quarterly Meeting	Cancelled due to Hurricanes.
1 st Quarter	Quarterly Meeting	Due to the amount of hurricane activity and the disruption created through central and south Florida, a quarterly meeting could not occur.
September 17, 2004	Formal Training Session “Overview of WiSCC Process”	WiSCC training for 35 WSC’s presented by Bob Foley and Carol McDuff.
September 17, 2004	Quarterly Meeting	Marcia Vollmar, Ed Ruley, Jeff Smith, Philos Molinos, Bob Foley and Carol McDuff. Discussed feedback from the morning training session, discussed the new tools for QI, and reviewed district data.
District 9		
District 10		
August 12, 2004	Quarterly Meeting	Cancelled due to hurricane.
September 23, 2004	Quarterly Meeting	Martha Keim and Carol McDuff met and discussed the WiSCC and CORE tools, reviewed district and state data trends.

District/local contacts		
Date	Description of Activity	Participants and Audience
District 11		
August 11, 2004	Formal CORE and WiSCC Training	Training to providers on the new consultative process by Anna Quintyne and Carol McDuff to @80 participants. Beth Townsend and several district staff also participated.
August 11, 2004	District Contact	Discussed the new processes with Kirk Ryon.
1 st Quarter	Quarterly Meeting	Due to the amount of hurricane activity and the disruption created through central and south Florida, a quarterly meeting could not occur.
September, 2004	Phone Contact	Jose Navarro spoke with Kirk Ryon on a specific provider concern.
District 12		
September 22, 2004	Formal Training Session "Implementation Planning"	Marion Olivier-Ruelas presented training to 54 provider staff. Local Delmarva reviewers, Sil Vazquez and Christine Stevenson assisted.
October 25, 2004	Quarterly Meeting - Had to be rescheduled from 9/27/04 due to inclement weather	Marion Olivier-Ruelas, Richard Hollis, and 4 district staff. Reviewed the CORE and WiSCC process and discussed the latest quarterly data.

District/local contacts		
Date	Description of Activity	Participants and Audience
District 13		
September 24, 2004	Quarterly Meeting	Marion Olivier-Ruelas and 3 district staff. Reviewed the CORE and WiSCC process and discussed the latest quarterly data.
Region 14		
August 25, 2004	Quarterly Meeting	Bob, Charmaine, Christie, Eric Olsen, and Carla Bettis.
August 31, 2004	Led a workgroup to discuss how District 14 could work towards a results oriented service delivery approach.	Bob, Charmaine, Christie, Carla Bettis, as well as people receiving services, support coordinators, and providers.
District 15		
July 7, 2004	WiSCC Training	Carol McDuff presented the WiSCC tool during the monthly Waiver Support Coordinator's meeting. There were @25 WSC's present as well as district staff for a total of 36 receiving training
July 7, 2004	District Contact	Contact with Steve Stoltz on new review processes.
1st Quarter	Quarterly Meeting	Due to the amount of hurricane activity and the disruption created through central and south Florida, a quarterly meeting could not occur.

District/local contacts		
Date	Description of Activity	Participants and Audience
Region 23		
August 3, 2004	Gave overview of Delmarva activities to managers planning group at MacDonald's Training Center	Bob presented to a group of about 20 folks including Jim Freyvogel.
August 20, 2004	Formal Training Session "A Results Approach"	Bob Foley facilitated training for waiver support coordinators and provider staff for a total of 124 participants.
August 23, 2004	Led a workgroup to discuss how the Suncoast Region could work towards a results oriented service delivery approach.	Bob, Charmaine, Barbara, and Kristin, with APD staff including Carl Littlefield and Wanda Blanton, as well as people receiving services, providers, support coordinators, and Ann Millan of the FCC.
August 25, 2004	Suncoast Region Quarterly Meeting	Bob, Kristin, Barbara, Wanda Blanton, Dave LaPere, Brenda Clark, Marcia DiGrazia, etc.

Attachment 2

Outcome Element Evaluation Levels

Achieving

- Implementing components are present.
- The organization is assisting individuals to achieve outcomes, or to complete increments toward achieving the outcomes.
- Results that communicate choices and preferences that matter most to the person being served are observable.
- Consistent practices of self-determination/person-centered supports are evident in the organization's mission and practices.
- Provider knows the people they serve, includes their choices and preferences that matter most to each person, and continuously probes to ensure that this information is current and accurate.
- Education, Experience and Exposure are present, practiced and evident on a consistent basis.

Implementing

- Consistent action toward achieving outcome increments is predominately present, with only a few sporadic inconsistencies present.
- Strategies and organizational practices are in place to effect change and focus on the individual, but the results have not yet been achieved.
- Provider has general information regarding the people they serve and has methodologies in place for continued probing to update their knowledge about the person. However, this methodology is not consistently applied to all persons served.
- Education, Experience and Exposure are generally taking place and are being integrated into service delivery, but not all opportunities are being addressed.

Emerging

- Some or sporadic action toward achieving outcome increments may be seen, but overall outcomes are not being achieved.
- The provider has some systematic practices that relate to the individual's outcomes but they are implemented sporadically.
- Provider has general information regarding the people they serve but has no consistent system in place for continued probing to update their knowledge about the person.
- Some Education, Experience and Exposure may be taking place. However, the provider is not systematically and consistently implementing these concepts.

Not Emerging

- Little to no appropriate action has been taken related to the individual's identified outcomes.
- Any implementation related to the achievement of the individual's outcomes is either inconsistent or without direction.
- There is little or no evidence regarding the organization's mission, coordination and practice in the principles of self-determination/person-centered supports.
- The provider has limited information about the individuals and their choices and preferences.
- No planned or directed Education, Experience and Exposure are taking place.

Attachment 4
Internal Quality Improvement
Quarterly Report
July 1 – September 30, 2004

New Staff

Richard Hollis was hired as a CORE reviewer. His primary area will be in District 12, but he will cover other districts near his area when needed. Recruitment activities are underway for 3 to 4 additional reviewers and should be filled during the second quarter of this contract year.

General Staff Training

A comprehensive training session was provided to the WiSCC and CORE reviewers from July 26 through July 30. In attendance were all Delmarva Quality Improvement Consultants (QICs)¹ and managers, APD and AHCA staff, as well as representatives from JCR and The Council on Quality and Leadership. The CORE and WiSCC QICs met both separately and together in order to allow reviewers to focus on their individual processes, but also to discuss issues relevant to both review processes, such as a session that focused on Organizational Principles.

Consultants who have been conducting PPRs, will now be conducting CORE and consultants who have been conducting PCR's will now be conducting WiSCC. The two groups met together on Tuesday and Thursday, and had separate sessions on Wednesday and Friday. In addition, the CORE QICs met Monday afternoon and were given an overview of Personal Outcome Measures (POMs), Outcomes and Individualized Supports, The Council and the shift to a consultative approach in the review process. Other key issues and concerns were discussed and an overview of the seven Foundational Outcomes was presented.

The first day of combined training with the groups focused on the new direction of the review process. Anne Beachner, from The Council, presented the essentials on being a consultant and setting up a review process that is conducive to learning rather than one with an "auditing" atmosphere. The second day with the groups combined focused on organizational systems and practices including: Leadership and Systems Quality Management & Planning; Managing for Quality; Managing Outcome Data; Performance Improvement Models, Strategic Planning using Organizational Principles; and Quality Enhancement.

¹ Because the new process has a consultative rather than auditing focus, reviewers are now referred to as Quality Improvement Consultants (QIC). In this report, QIC and reviewer are often used interchangeably.

In the separate session, each group of QICs was given training and instructions on their specific process. CORE QICs reviewed the procedures to follow and how to write reports. They also received training on the new tool including a review of each of the outcome elements. A representative from JCAHO presented a session, training the CORE QICs on the new application, and Linda Tupper presented information on Health and Safety. An important component of their training included an afternoon session developing interviewing skills with a consultative or facilitative focus. On Friday, the CORE QICs were given a brief overview and basic training session on WiSCC.

WiSCC QICs received training specific to Support Coordination and POM interviews. Bob Foley presented a detailed review of the scheduling process, sampling procedure, opening conference and individual interviews. Training also included a review of the Tool, discussion of results and POM data sets, and Focus Plan development. Experiences from the pilot reviews were shared and discussed. On Friday the WiSCC QICs were given an overview of the CORE process as well as training on the process elements in the tool—the Minimum Service Requirements—and interfacing with an organization.

WiSCC

POM Monitoring and Annual Reliability

Although the Person-centered Review process has changed, being incorporated into the WiSCC, the POM interviews remain the same. The Council continues to provide on site monitoring of 5% of all POMs conducted annually. Council representatives accompany Reviewers on interviews and observe the administration of the POMs. Monitoring is designed to ensure that reliability in conducting the POM interviews is maintained as well as to provide ongoing technical assistance as needed. The Council completed reliability monitoring with three reviewers. In addition, they provided monitoring/coaching for reviewers on six POM interviews and monitored three WiSCC reviews.

In addition to monitoring provided by The Council, Delmarva Managers have monitored WiSCC reviews during the first quarter of this implementation period. Managers provide assistance and feedback in order to continue to build reliability among the reviewers and to enhance development of a consultative approach to the process. Reviewers will continue to be monitored if, in the managers' opinion, additional feedback is needed to ensure *consistent* application of the new tools.

Weekly conference calls with Consultants are used to address any issues, problems or concerns generated from the consultations. To improve reliability, several review scenarios are distributed prior to the conference calls. These are reviewed and “scored” by each reviewer, the results discussed and analyzed during the call. This process will continue to build reliability for the new process.

Annual Gold Standard Reviews

100% of the WiSCC reviews are reviewed by the Regional Managers. Regional Manager review and approval of all reports continues to ensure accuracy and consistency in the identification and development of recommendations, as well as the consistency of application for all elements. The process of report review and approval includes individual follow up and consultation with the reviewer.

Consumer and Family Feedback

The AHCA Recipient Survey continues to be distributed to individuals participating in a Personal Outcome Measures interview. AHCA staff maintains a report on this feedback. A committee has been formed to revise the Recipient Survey. This committee was scheduled to meet prior to the September IQC meeting that was canceled. The committee will meet prior to the December meeting.

CORE

Q & A document and protocol update

Weekly conference calls with Consultants were held following the formal training in July. These calls focused on issues, problems or concerns generated from the new consultation process. Minutes of these meetings were provided to all review staff and include Q&A's. To improve reliability, several review scenarios are distributed prior to the conference calls. These are reviewed and "scored" by each reviewer, the results discussed and analyzed during the call. This process will continue to build reliability for the new process.

Scoring and documentation analysis

Regional Managers reviewed and approved 100% of the CORE Reviews. Ongoing feedback was provided as necessary. Ongoing review by the Regional Managers provided a mechanism to ensure that reviewers were consistently interpreting elements and documenting justifications in an efficient and appropriate manner.

Reconsiderations

Fifteen reconsideration requests were processed during this quarter. One Regional Manager has assumed primary responsibility for this activity, though the PPR Coordinator completes some of the less involved reconsiderations.

Medical Peer Review

The Medical Director completed 23 quality assurance reviews of completed medical peer reviews from Year Three. No issues or recommendations were noted.

Evaluation of Provider/consumer education

Eleven formal education/training programs were provided during the first quarter. There were over 240 participants that included an array of providers. The overall average evaluation score for the training was 3.34 on a 4-point scale.

Timeliness and Submission of Deliverables

Delmarva and its program partners are continuing to develop internal management systems to ensure that required timelines for conducting reviews are being met and that review data are being gathered in a format that can be analyzed in an aggregate form. Due to the start-up of the new processes and the impact of four hurricanes this quarter, review volume has been negatively affected. The project staff is collecting data to determine the length of time reviewers need to complete the new processes in order to ensure proper scheduling and completion of the required number of reviews for Year Four.