Guide to Case Feedback to Workers

One of the features of the Qualitative Review Process that sites find most useful is feedback to individual caseworkers about their cases at the conclusion of the review. The worker “debriefing” is intended first to assure that the reviewer’s perception of the case is accurate factually and second, to offer any suggestions that might be considered to improve case outcomes. In providing this feedback, the following process is suggested as an approach to constructive information sharing and coaching.

Beginning the Conversation

Remember that the process of having anyone review your work is anxiety producing, even more so when the reviewer is a stranger and characterized as an expert. Please keep this in mind when you meet with the worker about observations.

Point out to the worker that the purpose of the debriefing is to make sure that you have understood the current status and facts of the case accurately and also to offer any suggestions that might be helpful. Of course, you should start with the strengths of the case. Include strengths of the worker’s contribution as well as those of the system. Be specific and explain why you think the positives found are important. A little self-disclosure can be reassuring, so in cases that are not going well, consider sharing an example of your own struggles with difficult cases.

Describe the current status, key players and important issues observed. It is not uncommon to learn things about the case that the worker does not yet know, because you have had the opportunity to view the case more recently and talk to all of the contributors at one time. When this occurs, it helps to remind workers that it is not unusual to learn new facts during reviews because we have the luxury of being able to invest substantial time in each case.

At this stage, it is also common that you find that the case plan has not been kept current with events or intentions in the case. A gentle way to approach this is to offer the worker an opportunity to tell you what he/she expects to do in the next month related to the case, even if intentions have not yet been incorporated into the plan. Some reviewers say, “What would you have liked to have done differently, knowing what you know now?” or “Having heard these facts, what would your plan for this child/family be, or what ideas do you have for addressing the current issues.” This option provides a solution-focused opportunity for the workers to address their own case issues.

Discussing Practice Challenges

The most sensitive part of the debriefing process is offering feedback about the practice challenges that were observed. It sometimes helps to let the facts of the case communicate issues of concern, rather than stating them as your own assessment. For example, rather than simply stating “the school is unaware of the child’s psychotropic medications and doesn’t understand their effects on the child” (implying that the worker should have provided them), you might say, “the teacher wondered if the child was on medication and how that was affecting his behavior.
What is the system’s policy on sharing such information?” Quotes from case stakeholders can be a less judgmental way of surfacing issues. Be certain, however, that you don’t reveal a remark that the family member or stakeholder didn’t intend for you to share.

When contradictions to the worker’s perspective or understanding of the case are exposed in the case review, the time-tested phrase, “I’m confused…” is another nonjudgmental way of communicating the identification of discrepancies. For example, regarding differences in the understanding of case goals, you might say, “I know that reunification is the permanency goal, but I’m confused because several of the case contributors seem to think that this child will never go home. Am I misunderstanding this?”

**Discussing Recommendations**

It is wise to be clear that having only spent a day and a half reviewing a case, it is not always possible to surface practice development ideas in such a short span of time. If you have suggestions, however, it is helpful to describe them as options for the worker to consider. We do not want to dictate case practice in this role, so be sure the worker understands that you are only identifying options that might be useful.

If there are serious case problems, particularly related to safety concerns, using the term “concerns” is a good characterization. For example, “One concern that I want to share is the fact that the mom’s therapist worries that she has begun using drugs again. I don’t get the impression that this has been communicated to you, but it seems important to me,” is a way of communicating the concern without criticizing the worker for not yet knowing a key fact. In the uncommon event that you discover an imminent risk of harm to a child, remember the obligation to insure that it is communicated to the worker and supervisor.

The hardest form of feedback involves communicating concerns about an issue that the worker doesn’t see as harmful. A common example is the lack of concern (or at least resignation) about children with frequent moves. This is as much a system issue as an individual practice issue. You might say, “I know you’re as concerned about the number of placements this child has had this year as I am. What resources can the system offer to stabilize this child? If you had the power to change the way the system functions, what would you do?” Again this solution focused question permits the worker to contribute to the case solution.

Don’t overwhelm the worker with suggestions. Also, separate system solutions from changes in worker practice. Workers are most interested in what they could do differently tomorrow.

In concluding the debriefing, you want to be sure that in your efforts to be strength based you haven’t led the worker to believe that status and performance issues are better than you actually found them. When/if the reviewer knows at the time of the debriefing that one or both domains will likely be rated “unacceptable”, it should be communicated clearly, in the context of any mitigating aspects such as systemic difficulties beyond the control of the worker or newly surfaced information. “Although a lot of good work has been done in this case, the fact that the man that was suspected of fondling Marie is back in the home creates an unacceptable safety
rating. I want you to be aware that an unacceptable safety rating will result in an unacceptable child and family status rating.” The written case story shouldn’t be a surprise.

Of course balancing candor and affirmation are the challenges that make this process so useful. Before you conclude, give the worker an opportunity to ask questions. It is always helpful to conclude by providing a wrap up and review, to check out what the worker has heard (or perceived) in the debriefing. It may be really helpful to ask for feedback directly, such as, “Having heard all this, have we gotten things ‘right’? Are there pieces we may have missed or misunderstood?” It doesn’t hurt to end with a highlight that reflects some strength or progress directly related to the worker’s efforts or skills.