Instructions for On-Site Review Team

Preparation ♦ Scoring the Instrument/Reliability ♦ Completing the Report

A. Preparation - Before the On-Site Visit

1) Download and print the following reviewer tools:

   - **Reviewers' Standards of Service Instrument/Questionnaire**
   - **Reviewers' On-Site Prompt Sheets**
   - **the Glossary of Terms** (PDF file)
   - **this document: "Instructions for On-Site Review Team"** (PDF file)

2) Also, each reviewer will need a copy of the

   - **Certification Application Notebook/Materials** (provided by the Agency)

3) Review the Standards of Service Instrument/Questionnaire and Prompt Sheets. The instrument/questionnaire includes all the indicators that will receive a rating after you have completed your observations, interviews, and documentation/data reviews. The on-site prompt sheets correspond to the indicators in the questionnaire, and each section spotlights the documents/records the review team needs to review and/or the questions or observations the reviewers need to focus on to fairly and accurately rate the various indicators. The glossary of terms is a resource tool that may prove valuable if you are unclear on any of the instructions or terms you encounter throughout the review process. After printing out these documents and reviewing them, organize them in some type of easy-to-use binder and keep them with you throughout the on-site visit.

4) Read and review all the materials submitted in the agency's certification application. Make note of any strengths or weaknesses on your prompt sheets; include any questions you want to ask for clarification purposes. If you note any materials are missing, let the primary reviewer know immediately; the primary reviewer will need to arrange for the inclusion of any missing information. Arrive to your on-site visit prepared to follow-up on the observations and assessments made based on the certification application materials.

B. Rating the Instrument/Questionnaire and Achieving Reliability

- Review the Ratings of Compliance information on page 2 of the Reviewers' Instrument/Questionnaire.

- Separately and as individuals, each review team member (including trainees) will go through the instrument and score each question based on the information/data they have obtained and observations they made.

- Each question should be carefully read, paying attention to subtle differences; be aware that minor things like *e.g.* versus. *i.e., and* versus *or,* and other word choices affect the meaning of the question.

- When choosing your rating, remember to reflect on the overall purpose or function of the indicator (which is highlighted in bold) in addition to the details provided. Focus solely on the contents of each individual question, avoiding the temptation to include something that may not belong; it may be that another question addresses that issue later, or you may realize something is a non-standard issue that can be addressed in the reviewer comments without affecting the score.

- When using the agency consumer and/or practitioner consumer surveys as a source of compliance for certain indicators (e.g., Integrated Systems DD.1, 2, 3, & 4 , indicators F), consider not only the scores but also the accompanying comments. For instance, when a category's average falls below criterion, consider the nature of the concerns expressed. Use that feedback as well as the information you gained from your on-sight interviews to determine whether it is more fair and/or effective for the score to be rounded up or down (i.e., a 2.89 average could result in a score of "2" or "3" depending on all the data reviewed).

- Once individuals have had the chance to score their instruments, the review team meets together bringing their rated questionnaires and prompt sheets.

- The review team members go through the instrument question by question and share their ratings, supporting their scores with key data points. If there is a discrepancy between reviewers' scores, the team will need to discuss the data further until a consensus is reached. If a consensus cannot be reached, the review team will need to return to the site and pursue additional clarifying data via additional documentation review, interviews, or observations. If a review team remains split in its opinion (e.g., two review team members feel strongly that a "2" is appropriate while two review team members feel strongly it's a "3"), the review team will need to find a compromise based on what is most fair and effective for the agency.

C. <u>Getting the Certification Report Written and Complete</u>

General Information Regarding the Report Form:

- The results of all reviews will be compiled into a **standardized electronic report form** (**triennial report form.doc** or **annual report form.doc**. are both available on the TFA website).

- The primary reviewer will need to **download and save the report form to his/her computer.** Simply download the document, then place your cursor and click on "file" then scroll down to "save as" and **rename the file** in this manner: agency identification-type of review-current year (e.g., Vera Lloyd_Triennial_2007.doc, AFI_Triennial_2007.doc, etc.).

- All word processing should be done in **Microsoft Word, Times New Roman 11 font** for easy copying and pasting into the report form.

Completing the Report:

•Step 1: The primary reviewer coordinates individual assignments amongst the team and determines the process and timelines for completing each section of the report. A completed report includes specific summary comments that follow and describe the status of each Standard of Service (the four goals, the four integrated systems, and six elements — a total of 14 summaries — each approximately a half page and no more than a full page in length). The report concludes with a final overview/summary of the Agency's strengths followed by the review team's suggestions, followed by recommendations — if warranted. (Recommendations are only required for any indicator that received a rating below 3; if all scores were 3's and 4's, only suggestions apply. See Page 2 of the Reviewers' Instrument/Questionnaire for further instructions regarding suggestions and recommendations.) These sections can be divided in any logical way that the primary reviewer deems most effective; however, the primary reviewer typically writes the final summary portion. The primary and the secondary will both participate in the editing process.

•Step 2: Reviewers proceed with their writing assignments (using Microsoft Word Times New Roman 11 Font). Summaries should consist of clear, specific strength-based feedback as well as descriptions of deficits found in those indicators where below-criterion scores were offered. Any recommendations, however, regarding how to address those below-criterion indicators can be saved for inclusion in the designated placement in the final report summary. As writing assignments are completed, they need to be turned in to the primary reviewer who will edit them as necessary and paste them into the report form.

•Step 3: Listed below are sections of the report to be filled out. Simply enter data and text into the gray information fields. Use either the tab key or arrow keys to navigate from field to field.

1) Cover Sheet
2) Overview Information Sheet
3) Summary of Scores Chart (Complete after calculating averages.)

(a) Enter each standard's average under the average column. The number you enter will overwrite the 0.00 default score that is already there. See the sample below (3.67, 3.00 , 2.90).

(b) After entering the average, move your cursor to the appropriate field to the right where you will enter an "X" to visually indicate the average. Once you click on the applicable field, use your space bar to move the cursor to the closest spot that matches the score (each spacebar push is approximately 0.05 on the scale).

SAMPLE

TFM Goals	Avg.
Humane **(a)**	3.67
Effective	3.00
Individualized	2.90
Consumer Satisfaction	0.00

(b)

				Criterion Area			
1		**2**		**3**			**4**
							X
				X			
			X				

Completing the Report, Continued . . .

4) Scores for each indicator and averages for each Standard
5) Written commentary sections following each Standard
6) Summary Report

[The summary report includes a **summary of strengths**, **reviewer suggestions** that address minor Standard of Service issues, or areas that fall outside the purview of the Teaching-Family Association Standards of Service, and **reviewer recommendations** that involve Teaching-Family Association Standards of Service deficits (i.e., **any indicator that received a below criterion rating *requires* a recommendation**).]

<u>•Step 4:</u> Once everything is filled out and completed, it's time for the proofing and editing process. Ideally, all reviewers should take part in this process and have the opportunity to read the entire report before it is submitted.

<u>•Step 5:</u> After the editing process is complete and the report is deemed finished, the primary reviewer submits the report electronically to the reviewed Agency and to the TFA office no later than two weeks prior to that year's TFA mid-year meeting. The TFA office will then forward the report to the C&E members for their review.

<u>C & E Committee's Review of the Recommendation at the Mid-Year Meeting:</u>

The primary reviewer will give an oral report to the C& E Committee, highlighting the Agency's strengths, challenges, and deficits (if applicable). **The primary reviewer needs to bring his/her copy of the application in case there are questions regarding consumer comments or other details included in the application that may have been omitted in the report but might add substance to the discussion**. After hearing from the review team and considering all the information contained in the report, the committee will vote whether or not to forward the review team's recommendation to the Board of Directors.