

Citizen Review Board Telephonic Reviews TRAINING

➤ Introduction

- **Your presenter:** Kristina Knittel, CRB Field Manager – Deschutes, Crook, Jefferson, Harney and Grant Counties. Thank you so much for joining me today for this training, and for being a part of keeping our court system functioning for families and kids, rain or shine!
- **In accordance with federal and state restrictions related to the COVID-19 virus, all CRB reviews will be conducted via teleconference until further notice.**
- While we don't know how long this will last, it's worth our time to develop this process. Why?
 - We should learn how to do this comfortably so that we are able to fall back to telephonic hearings any time we need to in the future (such as during times of inclement weather or other major events).
 - Having a back-up plan is always efficient.
 - Most importantly, this is needed now to keep our communities safe.
- **This Training:**
 - This training will help you prepare to switch to a telephonic review format. The training will consist of this short podcast and accompanying written materials:
 - **Telephonic Reviews Cheat Sheet** – Contains a printable checklist of protocol for telephonic reviews including telephone commands, important numbers, and tips.
 - **Telephonic Reviews Opening/Closing Statements**
 - **Issue-Focused Reviews Document**
 - **Telephonic Reviews Training Guide** – This guide will walk you through all the information that I will be covering verbally during this podcast.
- **Questions?** If you have questions during this time, please write them down. After you complete this training, your field manager will answer your remaining questions. They will also guide you through a telephonic review practice run and give you more specifics about what telephonic reviews will look like in your county for your board.

➤ Section 1: Nuts and Bolts

- **Preparing for Telephonic Reviews**
 - **Before the Review:**
 - **Others are preparing as well.**
 - All parties will now be receiving a new legal notice with information about participating in

CRB reviews now that they are entirely telephonic. Parties will be provided with call in information, tips about how to ensure confidentiality, how to mute and unmute the line, and a Findings Guide, similar to what they would have had in front of them at an in-person CRB review.

- Your Field Manager is also helping by preparing stakeholders like CASA, DHS and attorneys for these changes, as well as scheduling the review days in such a way as to allow ample time for each case, given the new steps and procedures that we will be using.
- **Here is how you can prepare as well, the day before your review.**
 - **First, think about your space:** Think about where in your home you will conduct CRB reviews now. Choose a space suited to maintain confidentiality while having all documents in front of you and readily accessible, and to avoid all background noises. All of us know what it is like to speak to someone who is on their cell phone in a windy place or a crowded room. Remember that even something quiet in your home like a heater vent or the clicking of your keyboard as you take notes may sound very loud when it is near your phone's microphone. Put a little bit of thought into these things as you choose where you will conduct reviews.
 - **Next, think about your technology:** Technology you will want to plan for might include your phone and phone charger, computer and computer charger, and Bluetooth headset and charger for that. Be prepared to switch to regular speakerphone or handheld phone if your Bluetooth or wireless headphones do not work or cause an echo. Also, consider your Wi-Fi and cell reception in different areas of your home. If you are using a cell phone, remember to turn off "notifications" so that whenever you get a text or email, it does not beep or vibrate on the line. Get familiar with how to mute your phone too. Field Managers will be asking that everyone keep their line muted until they are speaking, to avoid

excess of background noises. If you want to use the teleconference line commands for this, you can mute your line by pressing *6 and unmute your line by pressing #6.

- **Next, gather your materials for review day:**
 - Your documents for each case
 - Your computer or printed documents for notetaking
 - Your phone/technology set-up
 - The conference line number, readily available in case you lose contact mid-review and have to call back quickly:
 - 1-866-921-1127
 - Your Field Manager's unique conference code: _____
 - Your short cheat sheet of telephonic reviews protocols, commands and tips. (See your written materials.)
 - The new telephonic review version of the opening and closing statement. (See your written materials.)
- **Lastly, get mentally prepared:**
 - Issue Focused Reviews (See your written materials.)
 - Check in with your Field Manager
- **Conducting Telephonic Reviews**
 - **What will a typical review day look like?**
 - **Set Up:** Ensure your space is set up like you want it and you have everything you need in front of you.
 - **Call In:**
 - Call in at 1-866-921-1127.
 - Enter your unique conference code.
 - Please listen carefully to the instructions on the line. It will ask you to say your name out loud and then press pound.
 - This is very important because it will allow the Field Manager to know who is on the line.
 - **Board Business:** We will conduct Board business time together at the scheduled time as usual.
 - Please call-in promptly at the designated Board business time. We will want to have ample time to ensure connectivity, iron out any technical

issues, and to discuss cases fully. It will be extra important to do so now, so that when parties are on the line for the review, we are respecting their time and completing reviews effectively and on schedule.

- During your board business time, the Field Manager will work with the board to choose a board member who will read the opening and closing statements for each review.
- The Field Manager will also let you know the order in which board members will introduce themselves that day. A common way to arrange this might be alphabetically by first or last name.
 - **TIP:** Write down where you are in the order, so you know when to introduce yourself, since we won't be able to just introduce ourselves by going around the table anymore.
- You will then go over details of each case. (See Issue-Focused Reviews document in your written materials.)
- **Calling In Late:** Please simply wait on hold until the Field Manager lets you back in to the conference line.
- **Reviewing Cases:** After board business time, your Field Manager will unlock the conference line and let on everyone who has been on hold waiting for the first review to start. The Field Manager will welcome everyone and lay some ground rules, then guide introductions.
- **Introductions:**
 - Introductions will be led by the Field Managers.
 - Introductions will occur *before* a board member reads the opening statement. Some Field Managers might do introductions by having parties introduce themselves in categories (such as parents first, then foster parents, then kids, then attorneys, then DHS, then CASA, etc.), or they might do a "roll call" style introduction where they check to see what parties are there, calling each name out loud, and then ask that any others on the line identify themselves and their relationship to the case.
 - **TIP:** Either way, some board members who have conducted telephonic reviews in the

past suggest writing down the first names of each party as they introduce themselves, so you know who is on the line, who is speaking, and who you can ask questions to.

- **Starting the Review:** After introductions, the designated board member will read the new opening statement, with introductions of the board member proceeding in the order that you predetermined.
- **Opening/Closing Statements:** The opening and closing statement has been revised for phone reviews. Board members will introduce themselves during the opening statement in the order you determined during board business time.
 - **TIP:** Remember, the rest of the parties will be introduced before the opening statement is read. Be sure to write down any names that you want to have in front of you during *that* time, while your Field Manager is taking attendance, and do not wait until the opening statement is being read to do so.
- **Leading a Review:** Once all of this is complete, the lead reviewer will start leading the review as usual. The main differences will be:
 - All non-leading board members will remain quiet on the line until the lead reviewer asks them for input or to vote yes or no on a finding.
 - Every question the lead reviewer asks must be directed at one specific party at a time; no open discussions that encourage cross-talk.
- **Concluding the Review:** Once the review is finished, the designated board member will read the closing statement, and the parties will hang up. The Field Manager will make sure all parties hang up before they lock the conference line again. They will then wait with you on the locked conference line until it is time for the next case to begin.
 - **TIP:** Please do not just hang up at the end of each review unless your Field Manager specifically directs you to do so. Otherwise, you will need to call back.
 - **“Disconnect All Lines” Protocol:** If it is absolutely necessary, the Field Manager might disconnect all lines at this time, to ensure that no attendees

remain on the line. If your Field Manager does this, they will state that they are doing so. When your line disconnects, please follow the “Disconnect All Lines” protocol:

- Hang up
- Call back immediately
- Wait on hold for your Field Manager to restart the conference.
- It is possible that this “Disconnect All Lines” protocol may need to be used at other times too, not just between reviews. For instance, Field Managers may disconnect all lines when there is a party on the line who refuses to hang up before the next review, or who is not supposed to be on the line for the current review or board business time.
 - **TIP:** The Field Manager will not verbally instruct you to call back right away, because they will not want the errant party on the line to also call right back. So remember what to do!
- **Between Reviews:** Remember not to make any comments or start talking about confidential matters until your Field Manager has finished checking the line and ensuring that all parties are gone. Stay focused and in “review mode” until this occurs. Once your Field Manager gives you the go-ahead, if they do, you may *then* discuss the next case or other information.
- The next review will start when the Field Manager opens up the conference line again, and the process we just discussed starts all over again.
- **Ending the Review Day:** At the end of each review day, before the Field Manager disconnects the conference line for the day, there will be ample time for the board members to decompress and talk confidentially.
 - **Signature Sheets:** During this time, your Field Manager will verbally request permission to sign the Signature Sheets on your behalf. You will not have to physically sign or submit anything else.
- Whenever everyone is finished discussing cases, the Field Manager will simply end the conference call, and you’re done!

➤ **Section 2: Important Guidelines for Conducting Telephonic Reviews**

- **Professionalism:** Professionalism becomes all the more important with telephonic reviews if we want to remain trauma-informed.
 - **Staying Trauma Informed:** For our reviews to continue to run smoothly, we should put extra effort into exercising compassion towards others, and towards ourselves.
 - **Having compassion towards others** on the line does not mean making “yes” findings when we should be making “no” findings, or vice versa – it does not mean that we fail to conduct valuable reviews or ask meaningful questions even if they are tough. It does not mean that we don’t make findings that may be uncomfortable for people or that we don’t make recommendations that could be difficult to implement. Rather, having compassion towards others is simply defined as recognizing their suffering, the stresses they are experiencing both large and small. We recognize that others are suffering by listening, being patient, and being kind.
 - **Having compassion towards ourselves and fellow board members** looks similar. If we make a mistake, we forgive ourselves and move on. If we run out of time on a particular review, we conclude the review with what we’ve got, and move on to the next review. Hopefully that review will end on time. Perfection is not necessary in order for us to be effective.
- **Conducting the Review:**
 - **How will we know who is talking?**
 - Your Field Manager will ask that parties identify themselves before they speak.
 - Always indicate to whom you are addressing your question, and not ask general questions to all parties. This is good practice any time, but especially during telephonic reviews!
 - **Questioning Parties:** Because we are asking parties to remain quiet until someone asks them a specific question, there are a few things you will want to remember to do:
 - Always indicate to whom you are addressing your question.
 - If you have one question that you want several parties to answer, ask the same question repeatedly instead of opening it up for discussion.
 - Remember to always ask parents (if they are on the line) for information under Finding #3 about their child and services that they think their child may need.

- It is critically important that parents have the opportunity to provide input about their own children, and that we don't crowd them out by focusing on DHS, CASA, and the foster parents.
- We promise on our legal notices that every party will have an opportunity to provide input, and we must ensure that happens.
 - **TIP:** At the end of each finding, ask whether anyone else has something add which is *relevant* to this finding.
- **Non-Leading Board Members:** To avoid confusion, the Board members who are *not* leading the case should refrain from interjecting with any follow-up questions until prompted by the lead.
- **We will be lacking body language** cues from participants, so remember to ask at least once under each finding whether any other party has something *relevant* to add or ask.
- **People are listening to you:** Please as always, avoid jokes or side chatting which may be misinterpreted or get confusing over the phone. Stick to simple and clear communication. Be mindful of any comments you don't want others to hear, and don't make those comments.
- **Be Prepared:** This is extra important now!
- **Stay On Schedule:** Please put extra effort into remaining on-task so we don't get behind schedule. That is particularly important now that your Field Manager cannot go out to the waiting room and tell people that we are running late. They cannot speak with people on hold either without letting all parties who are on hold waiting for the next review into the current review's conference call. So, everyone from the next review will be waiting on hold and we do not want them to disconnect thinking the review is cancelled.
 - **Reviews that run over by 5 minutes will be ended:** This is necessary to maintain fairness and so that the full day of reviews is not negatively impacted. This means that if the review takes longer than the allotted time, the Field Manager may have to end reviews even when you have not gotten through all of the findings or made your recommendations. If this happens, the Field Manager will choose one of two options:
 - Usually, the review will simply be continued to the next month. This is not ideal because it lengthens the review day for next month and may bump other families' cases from the schedule. So,

although this is an option, it is crucial to stay on schedule so that this does not need to happen.

- Secondly, in very limited circumstances when a review is almost but not quite complete, your Field Manager may decide that the board can check back in with that case at the end of the day, completing the findings and recommendations with the information you got at the review and the documentation provided in your packet. This will only happen when absolutely necessary and when the Field Manager can adequately provide notice via email to all the parties regarding your findings, in order to maintain transparency in the process.
- **Key point:** Manage your review time wisely!
- **What do we do if there is an interpreter in our review?** Your Field Manager will be scheduling reviews that require interpreters for twice as long as normal. Here are some tips from the Courts for telephonic hearings with interpreters:
 - Don't respond to a question or comment from the court or other party until the interpreter is finished interpreting the question;
 - Communicate in small bites. Don't say more than one or two sentences at a time, so the interpreter can adequately interpret your comments.
 - Interpreters work very hard to keep up but their ability to interpret information will be dependent upon the clarity of that information.
- **Making Findings**
 - **Reasonable Efforts:** Determining whether DHS has made reasonable efforts is always difficult, because the standard is fluid and somewhat flexible on purpose. Now, making reasonable efforts findings becomes even more challenging and subjective. But, that is ok! Flexibility rather than "one-size-fits-all" rules and regulations is certainly more appropriate in an area of law and policy like ours where we work with families in crisis. So, we must get comfortable working with some gray area.
 - **The important thing to keep in mind** is that the reasonable efforts we are analyzing are those of the *entire statewide agency of DHS* including their contracted partners/foster

parents. We are not analyzing only those efforts of the individual caseworker in your individual county alone.

- Ultimately, this is the key:
 - Children need certain resources to ensure their safety, health and well-being.
 - Parents need sufficient resources in order to adequately address every single basis of jurisdiction.
 - If any of those necessary resources are not being provided to the children or parents, then the efforts that the agency has made, however good-hearted, are not reasonable to protect the child's well-being and allow parents to make changes needed to safely reunify with their children.
 - **NOTE:** As a reminder, part of the power of a negative "reasonable efforts" finding by the CRB is that it will likely extend the timetable for DHS to provide reasonable efforts and meaningful services to promote reunification between the parents and their child. No one, including DHS, wants to see families permanently separated just because their time ran out during a pandemic when services were not available.
 - **NOTE:** Another important thing to keep in mind is that what was reasonable in January 2020 may not be reasonable in April 2020. There is some flexibility built into any legal standard based on reasonableness.
- Your Field Manager will be discussing this topic with you further.

➤ **What's next?**

- Please check in with your local Field Manager with follow up questions.
- Complete a trial run through of a telephonic review day with your Field Manager.
- **Thank you!** We so appreciate your flexibility, your extra work, and all the heart and effort you put into these cases both now and every single month.