ADVANCED SDM® TRAINING SERIES: HOTLINE TOOLS TRAINER GUIDE

TRAINING OBJECTIVES

Participants will:

- Strengthen their foundational understanding and skills to support fidelity use of the Structured Decision Making ® (SDM) hotline tools;

- Develop strong interviewing skills to support a rigorous and balanced assessment at screening, built on Integrated Core Practice Model (ICPM) and Safety-Organized Practice (SOP) values, behaviors, and skills; and

- Learn how to combine strong interviewing skills with the structure of the SDM hotline tools to achieve accurate, consistent, and equitable decision making.

INTENDED AUDIENCE

- All staff and supervisors whose primary responsibility is hotline/intake.
- All staff and supervisors who are responsible for screening after-hours or weekend calls to the child welfare hotline.

TRAINING FORMAT

This workshop is designed to be delivered as a half-day, three-hour module. Curriculum can be adapted for either in-person or virtual delivery.

The advanced SDM modules are skill-based. While the modules include some lecture time to introduce ideas for strategically integrating SDM assessments into practice, much of the learning is acquired through individual and group exercises as well as discussion.

INTRODUCTION TO THE ADVANCED SDM TRAINING SERIES

This module—*Advanced SDM Training: Interviewing at the Hotline*—is one in a series of training modules designed to increase workers' skills in integrating SDM assessment tools into practice.

SDM foundational trainings provide context on California policy regarding when to use which SDM assessment tool and the technical aspects of how to complete SDM assessments. Every child welfare worker should receive foundational training on fidelity use of the SDM model to support accurate, consistent, and equitable child welfare decision making.

Advanced SDM modules focus on practice skills and decision making within specific child welfare programs, and workers may attend just those modules that apply to their work assignments. Workers who transfer to a new unit that uses different SDM assessments should be encouraged to attend an advanced module.

This module focuses on building interviewing, engagement, and assessment skills and on integrating these larger skills with the SDM hotline tools. This module is not a substitute for teaching foundational interviewing, engagement, or case documentation practice. Workers should have more extensive training in these areas in addition to this module.

Some local county policies or practices may be unique and can raise questions in training about how these policies interact with SDM policy. Trainers should note that local policy supersedes state SDM policy. While workers should be encouraged to follow local policy, trainers are encouraged to track areas of confusion or conflict raised by workers and follow up with local management to support resolution or clarity on conflicting guidance for workers. Workers may be operating under what they perceive is a policy, or the identified areas may warrant review by county leadership.

MODULE MATERIALS

Materials for each module are maintained on the statewide SDM training material website.

- https://docs.evidentchange.org/california/

TRAINER MATERIALS

- MS PowerPoint presentation with speaker's notes
- Trainer's guide

PARTICIPANT MATERIALS

- SDM hotline tools, definitions, and policies and procedures
- Participant guide

TRAINING OUTLINE

SECTION 1: HOTLINE FUNDAMENTALS

- **Purpose:** To strengthen participant understanding of the SDM hotline tools.
- **Time:** 75 minutes

TIME	ACTIVITIES	MATERIALS
20 minutes	Welcome, training purpose and agenda, and introductions • Small-group opening discussion	Slides 1–7 Breakout groups of 3–4 (10 minutes)
20 minutes	Review the SDM hotline tool foundations • Review hotline tool policy and procedures • Review guidelines for using SDM definitions • Review C+B+I (Caregiver + Behavior + Impact) formula	Slides 8–14 Resource: SDM System Fundamentals
15 minutes	Interviewing skills for rigorous and balanced assessment • The SDM system and ICPM/SOP • Discuss interviewing and engagement strategies	Slides 15–20 Resource: Solution-Focused Questions
20 minutes	**Large-group practice activity**: Screening decisions • Review interviewing ladder: Opened-ended questions, narrative-anchored follow-up questions, and fine-tuning questions • Engage participants in reviewing hotline definitions on several mini case examples for screening as a large group • Vignettes 1–2	Slides 21–27 Poll #5 and #6 Resource: Practice Vignettes
15 minutes	**BREAK**	**Slide 28**

SECTION 2: INTERVIEWING SKILLS PRACTICE

- **Purpose:** To strengthen participant skills in gathering information and decision making at the hotline.
- **Time:** 90 minutes

TIME	ACTIVITIES	MATERIALS
10 minutes	Large-group wrap-up: Questions/reflections • Engage participants in discussion around reflections or questions from round 1 of practice.	Slide 29
10 minutes	**Practice Part 2: Response Priority** Complete the response priority practice as a large group, using vignettes 3 and 4 to determine the response time for the caller's concerns.	Slides 30–33 Resource: Practice Vignettes
30 minutes	**Strengthening practice: Small-group skills activity** Use interactive mini-examples in the participant guide (Interviewing Exercise) to practice asking "missing link" questions to determine whether the caller's concerns meet the threshold for response. Participants will work in groups of two or three, as described in the exercise. Allow time for debrief as a large group for five to 10 minutes.	Slides 34–37 Breakout groups of two to three (20 minutes) Resource: Interviewing Exercise

20 minutes	**Strengthening practice: Tips and discussion**
	
	• Unasked versus unknown
	• Overrides and local policy
	  » Identify local areas of policy that may differ from SDM policy
	• Support network identification
	• Interviewing about the role of culture and context
	• Exploring for behavioral detail
	  » Generalizations and jargon
	• Caregiver action/inaction and impact on a child
		Slides 38–44
		
		Resource: The Purpose of Hotline Tool Overrides; Practice Vignettes
		
		Review common mistakes, the purpose of overrides at the hotline, and definition hot spots

10 minutes	Documenting the call *Optional: Provisional Harm and Danger Statements* Trainer introduces the concept of provisional harm and danger statements for use in hotline screener narratives and refers participants to examples in the participant guide.	Slides 45–48
10 minutes	Closing and evaluation • Ask participants to reflect on what they have learned and identify one or two ideas they will put to use while interviewing on the hotline using the SDM hotline tools • Share training evaluation	Slides 49–52

SMALL-GROUP SKILLS ACTIVITY: INTERVIEWING AT THE HOTLINE

Divide participants into small groups of three, and ask partners to choose person A, B, or C. There will be three rounds of five minutes each. Advise participants that they will be role playing a reporter–interviewer (i.e., hotline worker) interview. In each round, participants will switch roles until they have each taken a turn as the reporter, the interviewer, and the coach.

ROUND	PERSON A	PERSON B	PERSON C
1	Interviewer	Reporter	Coach
2	Coach	Interviewer	Reporter
3	Reporter	Coach	Interviewer

Before each round, each participant should have time to review the scenario for a few minutes. Participants should review which SDM items might apply, pull up the relevant definitions, decide what additional details they might need to gather, and generally prepare for the interview.

If at any point during the role play the interviewer gets stuck, they can ask the coach for support. They may ask the coach for suggestions on next steps, areas of SDM definitions to review, or other general support.

It is recommended that participants use the Web SDM Training Site for this activity so that they are practicing using the tool as they will in practice and will have ready access to the item definitions.

INTERVIEWER

- Objective is to become familiar with using the SDM hotline tool definitions during a live interview to guide assessment questions and ultimately determine whether a response is required.
- Ask as many questions as needed, using item definitions to guide next steps for your interview.
- Practice should focus on rigorous and balanced assessment by using SDM definitions, rather than on reaching a decision within five minutes.

REPORTER

- As you review the scenario, you may choose which additional details you might be willing to provide if asked, or what information is unknown.
- Do NOT disclose your intended decision.
- Use the information provided and your imagination to cooperate with the interviewer and answer their questions.

COACH

- As you review the scenario, consider reviewing which SDM items might apply and their definitions.
- While observing, follow along with the SDM definitions and consider what next questions the interviewer may want to ask to support a rigorous and balanced assessment.
- If there are questions that you wish the interviewer would have asked, write them down for discussion.

DISCUSSION

Ask participants for reflections on what they learned from the interviewing experience. What parts were most challenging? What parts came easily?

TRAINING POLLS AND PREPARATION

If training is delivered virtually, set up the following Zoom polls.

INTRODUCTIONS

- **Poll #1:** What best describes your current role?

  Answers: Hotline Worker; Hotline supervisor; After-hours or on-call hotline support; Management; CQI; or Policy
- **Poll #2:** How long have you supported screening at the hotline?

  Answers: <6 months; <I year; 1–3 years; 3–5 years; 5–10 years; 10–15 years; longer than 15 years
- **Poll #3:** On a scale of 1–5, how skilled do you feel in using the SDM hotline tools?

SYSTEM ASSESSMENT

- **Poll #4:** In your local system, which of these do you identify as areas of strength?

  Answers: Rigorous search for relevant details; Bringing SDM thresholds into the moment of the call; Identifying impact on child; Interviewing for strengths, culture, and context of behaviors; Identifying support networks

ROLE PLAY ANSWERS

As a part of large-group debrief, consider adding a poll to explore which decision participants reached for vignettes 1–4.

- **Poll #5:** For this vignette, which screening decision would you make?

  Answers: Screen in; Override to screen in; <u>Evaluate out: No criteria selected</u>; Override to evaluate out

  - » The situation when the child was 10 meets the definition for "physical abuse—caregiver action that likely caused or will cause injury." However, this report meets the FOUR criteria for a historical information override. Review criteria.

  - » Which SDM item(s) did you consider?

- **Poll #6:** For this vignette, which screening decision did you select?

  Answers: Screen in; Override to screen in; <u>Evaluate out: No criteria selected</u>; Override to evaluate out

  - » This concern does not meet the threshold for in-person response; review definition of "Emotional harm related to domestic violence" (previously "exposure to domestic violence").

  - » Discuss potential next steps.

    - – Screener may consider referral for differential or alternative response.

    - – If local policy is to respond to these allegations, discuss that this should be written in formal policy/protocol and tracked using a local protocol override to in-person response.

- Poll #7: For this vignette, which response priority decision would you make?

  - » *Answers*: <u>Immediate</u>; Within 10 days

  - » The child is less than 2 years old.

- **Poll #8:** For this vignette, which response priority decision would you make?

  - » *Answers*: Immediate; <u>Within 10 days</u>

  - » No circumstances meet the definition for "physical living conditions are immediately hazardous."

SESSION EVALUATION

A pre- and post-session evaluation is available for trainers to use, if desired. These resources can be sent ahead of the training session or shared in the session at the beginning and end.