

# Monitoring Process for Family Support and Home Visiting Programs

Regional Breakout Session  
November 14<sup>th</sup>, 2022

## Objectives:

- Provide an overview of targeted TA that will be offered in 2022-2027
- Provide an understanding of the new monitoring process for years 1-5
- Walk through the resources available on-line
- Next Steps
- Q & A

# Tiered Program Support

**Tier 1** provides the most intense level of supports including:

- Bi-Monthly and/or Monthly Calls
- Orientation Site Visit
- Additional Site Visit about specific issues and documentation

## **Who would be in this group?**

- New director/ Program Manager
- New Grantees
- High Staff Turnover/ Long-Term Vacancies
- Data input that is inconsistent or late
- Consistently Low Enrollment

# Tiered Program Support

## **Tier 2 Support** Provides:

- Bi-Monthly/Quarterly Calls
- Touchpoints about specific issues and documentation

## **Who would be in this group?**

- Moderate staff turnover/Long-term staff vacancies
- Moderately low enrollment
- Intermittently inputs incorrect or late data

# Tiered Program Support

## **Tier 3 Support Provides**

- Quarterly/Six Month Calls
- Additional visits and touch points can always be requested by the program

## **Who would be in this group?**

- Enrollment at 86% or higher
- Consistently provides correct and on-time reports
- Consistently inputs correct and on-time data

## **All Programs will Receive:**

- A minimum of one program site visit during the 5 year period
- Training and PD Opportunities
- Access to online resources including webinars hosted by OCDEL
- Each program will have a designated Family Support Consultant
- Ongoing review of program reports

# Family Support Monitoring Tool

**Year 1:** Orientation and Program Policies

**Year 2:** Program Policies, PD, CQI, On-site Visits

**Year 3:** Onsite Visits, Transitions and Referrals

CTF Only - Exit Interviews

**Year 4:** Onsite Visits

**Year 5:** All Onsite Visits completed and Exit Interview

## Each Year...

- Data Reporting:
  - Demographic
  - Performance Measures
- Enrollment
- Fiscal Reports
- Staffing
- Narratives





# Reporting Form Checklist

Reporting Year:													
<input type="checkbox"/> Year 1 (2022-2023) <input type="checkbox"/> Year 2 (2023-2024) <input type="checkbox"/> Year 3 (2024-2025) <input type="checkbox"/> Year 4 (2025-2026) <input type="checkbox"/> Year 5 (2026-2027)													
Quarterly Reports		1	2	3	4								
Quarterly Program Report													
Quarterly Expenditure Report													
Quarterly Staffing Report													
Monthly Reports		J	A	S	O	N	D	J	F	M	A	M	J
Monthly Enrollment Report (By 15 <sup>th</sup> )													
Monthly PDSA (CQI) – 18 <sup>th</sup>													
Data Entry (By 10 <sup>th</sup> )													
Calls with Programs (Dates)													
YEARLY REPORTS													
CQI Team Plan – August 31 <sup>st</sup>													
CQI Summary Report – Within 30 days of end of CQI Project													
GL Reconciliation													
Fiscal Audit													
Grant Renewals													
TWICE A YEAR													
CTF Outcomes Report													
NOTES													

## Year 1 Monitoring

- Orientation(s) and/or Initial Site Visit
- Program Policies and Procedures
  - Confidentiality
  - MOUs with specific agencies
    - Early Intervention
    - OCDEL Home Visiting programs serving overlapping areas
  - Reflective Supervision\*
  - Intake Process & Informed Consent\*
- CQI (Existing Programs)

# Coordination with Early Intervention

## MOU/MOA Requirements

1. Procedures of transitioning of children and families into and out of the program;
2. Procedures to refer to and from Early Intervention
3. Establish a point of contact by each agency
4. Outline protocols to share information, & coordinate services
5. Determine a frequency for the MOA to be reviewed and revised; and
6. The MOA is to be signed and dated by an authorized individual from each agency.

# Local Home Visiting and Family Support Agencies

## MOU/MOA Requirements

- The components of an MOA/U include:
- Name of parties involved
- Brief description of the scope of work
- Financial obligations of each party, if applicable
- Dates agreement is in effect
- Key contacts for each party involved
- The MOA/U should be signed by an authorized individual from each agency.

# Year 2 Monitoring

## On-Site Visits Begin

- Programs are encouraged to invite family members to discuss services OR present a case study of a current client
- File Review
- Interview Questions
  - External Relationships, Family Engagement, Sustainability, Implementation of Program

## Year 2 Monitoring

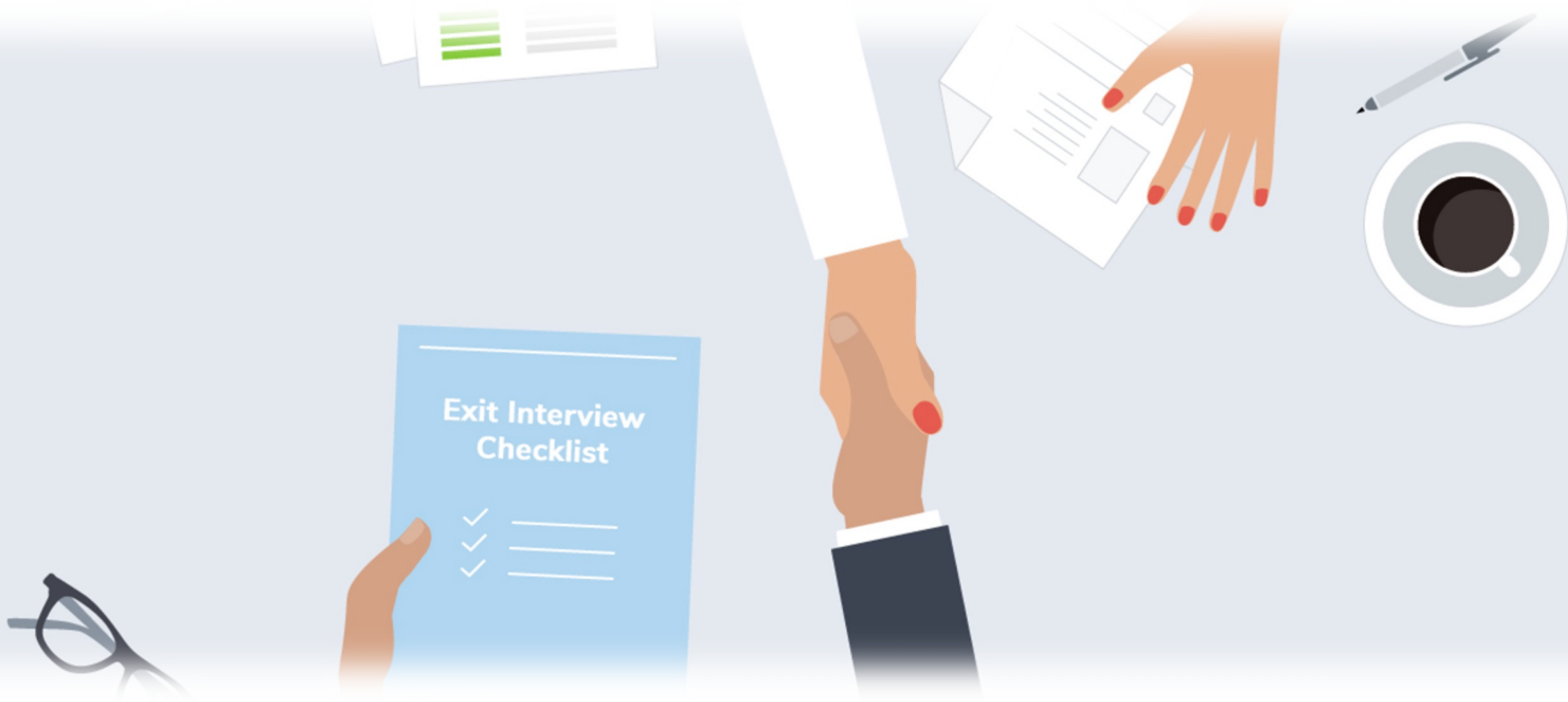
- Orientations/Professional Development
- Policies and Procedures
  - Inclusion and Expulsion\*
  - Equitable and Linguistically Responsive Services\*
  - Transition Planning
  - Community Coordination and Collaboration
- CQI

## Year 3 & 4 Monitoring

- On-sites visits continue
- Transitions and Referrals
- CQI
- Exit Interview (CTF Only)



# Year 5 Monitoring Exit Interview





## Online Resources:

<http://www.pa-home-visiting.org/providers/>

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Questions?



# Reflect and Discuss





**KEEP  
CALM  
IT'S  
LUNCH  
TIME**