



**HIPPYUSA®**  
Home Instruction for Parents of Preschool Youngsters

# TRAINER’S GUIDE TO SITE VISITS

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## PRE-VISIT ACTIVITIES

### COMMUNICATION

Regular communication –at least monthly- should occur with the coordinator. Initial contact should take place within one week of being assigned by the national or state office. It is strongly recommended that the first contact should be by telephone as a way to develop basic rapport with the coordinator, and to discuss and agree upon the preferred mode of communication (i.e., phone, email).

Initial communication with new sites should gather information about the following topics:

- Recruitment of staff (target number of home visitors, current status, hiring timeline)
- Recruitment of families (number of funded slots, current status, projected timeline)
- Program start date (Initial Site Visit conducted the week prior to full implementation)

Initial communication with existing sites should gather information about the following topics:

- Demographics (how many children are being/will be served, number of home visitors)
- Program start date
- Recruitment (issues or challenges, whether completed)

On-going communication with new site prior to an Initial Site Visit should include discussion, and problem solving, around the following topics:

- Recruitment of staff (current status, issues or challenges, need for staff to be hired prior to Initial Site Visit)
- Recruitment of families (current status, issues or challenges, need for all families to be enrolled prior to Initial Site Visit)

On-going communication with an existing site (all sites past Initial Site Visit) should include discussion, and problem solving, if indicated, around the following topics:

- Home Visits (Overall, how are they going? Are there high numbers of cancellations? Are challenges being encountered by all or some staff? Have the home visitors been able to develop rapport with all of their families? Are there any issues with role play? What technical assistance in this area is desired either before or during the visit?)
- Group Meetings (Overall, how are group meetings going? How often do they occur? What is the typical attendance? Are group meetings scheduled when the majority of parents are able to attend? Is role play incorporated into the group meetings? Was a survey conducted with parents? Are there any challenges with securing meeting facilitators for the most popular topics? Are parents able to evaluate the group meeting content and facilitators? What physical facility is used? How are the group dynamics? How is child care handled? Any issues? What technical assistance in this area is desired either before or during the visit?)

- Curriculum (Overall, how is the use of the curriculum going at your site? What is the staff's reaction/response? What is the parent's reaction to the curriculum? Are most parents on the same week? If not, how is this handled by staff? What technical assistance in this area is desired either before or during the visit?)
- Role Play (Overall, how is the training of your home visitors going? Are there any challenges in the use of the Home Visitor Guide? Are they well-prepared for working with their parents? Are you able to see growth in their skills? How well are home visitors incorporating early childhood terminology into role play with parents? Do you role play or discuss the "Before" and "After" comments? How successful is the staff in relaying this information to parents? What technical assistance in this area is desired either before or during the visit?)
- Staff (Overall, how would you assess your home visitors in terms of efficiency and effectiveness? How is the staff functioning as a team? Have any home visitors terminated since the beginning of the year? If there were losses, what was the cause(s)? Are home visitors full or part-time (# of hours)? What is the experience/tenure of staff? What are their general training needs? Any specific challenges with individual staff members? Have the orientation training modules been utilized with brand new staff? What type of support do you receive from agency administration? Are you full time with HIPPY? If not, what are your other responsibilities? Is there other agency staff to support with daily oversight? What technical assistance in this area is desired either before or during the visit?)
- Outreach and Collaboration (Overall, how well does your program do in terms of outreach and collaboration? How well does your advisory group function? Who are your primary partners? With which agencies would you like to develop a relationship? What kind of support do you receive from your partners (services, joint projects)? What technical assistance in this area is desired either before or during the visit?)
- Administration (Overall, is your program doing well to meet all of the HIPPY Standards? Do you have adequate funding for the full year? Do you make a budget projection each year? Have you seen, and read, a copy of the contract? Are all of your families within the boundaries specified in the contract? If not, have you sent a letter requesting boundary changes to HIPPY USA? Is there a process in place to effectively make referrals for families? What kinds of professional development opportunities exist for you? For staff? Are you using ETO? How is ETO going? Do you need additional ETO support? Are you keeping track of your supervisor's interactions with the program (i.e., group or staff meetings, home visits)? What is your rate of attrition? What technical assistance in this area is desired either before or during the visit?)

## SCHEDULING

### All visits:

#### Discuss with coordinator....

- Mutually convenient timing that will allow for all components to be observed/conducted, lunch, trainer completion of Accreditation Worksheet, Entrance and Exit Conferences (at least .5 hour and 1 hour respectively)
- Home visitors' (training) and supervisor's (exit conference) availability
- Facility/meeting/training space
- Agenda (to be completed by coordinator w/guidance from trainer – provide a sample agenda)
- AV needs, if applicable)
- Number to be trained, if applicable (# of copies needed)
- PR opportunities (media, agency administration, advisory group, other stakeholders)
- Transportation (airport, office/training site, how to recognize each other – sign or car make, model and color)
- Guidance re: selecting a hotel (your needs/amenities, proximity to site or en route)
- Share cell phone and/or home phone numbers, especially if arrival is after hours or on the weekend
- Reminder to have all relevant activity packets and storybooks for role play in staff meeting and any home visits so that you may follow along

***!!Notify national and state office, if applicable, of site visit dates***

### Initial Site Visit:

#### Discuss/confirm with coordinator...

- Applications completed for all families
- Hiring process completed for all home visitors
- Availability of "Welcome Packet" to include Excellence for Training manual and national video in DVD format (sent to coordinator by national office)
- Adequate training space (number to be trained, see above)
- Room / table set-up
- Availability of curriculum materials to role play week 1, usually Age 4 (C3PG can assist site with immediate shipment of materials essential for Initial Site Visit training)
- Agenda content (includes one on one time with coordinator, recommend some informal time with home visitors – lunch, if budget will permit)
- Tour of agency, tour of community (areas served, group meeting space)

### Existing Site Visit

#### Discuss/confirm with coordinator...

- Accreditation self-assessment (provide general guidance in year 2; provide specific guidance re: team members, process, timing for programs 3 or more years in existence)
- All documents utilized by self-assessment team to be maintained for review by trainer
- Hard and electronic copy of Accreditation Worksheet to be provided to trainer
- Improvement Plan, if applicable

## ON-SITE ACTIVITIES

There are multiple and sometimes overlapping activities that must be completed within a two day period. The ability to multi-tasking, think logically and employ excellent organizational skills are essential.

### **Entrance Conference with Coordinator (mandatory) and supervisor (recommended)**

- Obtain/confirm basic demographic information
- Discuss challenges/issues with programmatic elements or staff
- Confirm any special trainer role during visit (PR, training, staff observation)

### **Observe:**

- Staff meeting (mandatory) – deltas are small, speak to the coordinator after role play, if role play displays a serious lack of understanding, gently offer to take a lead and convert the observation to a training opportunity
- 2 home visits (mandatory) – offer diplomatic comments only if something occurs that will significantly compromise the parent's ability to understand/do the activity
- Group meeting (observation is optimal; video and/or Group Meeting Detail Form submitted by coordinator is acceptable\*) Note: \*Group Meeting Observation Form should still be completed after review of the video and/or Group Meeting Detail Form – both forms to be submitted
- Record observations on relevant forms – forms contain required elements plus best practices

### **Review:**

- Advisory Council Minutes
- Budget (current) and future or coordinator's forecast
- Coordinator's Resumé
- Enrollment Attrition Rates
- Enrollment Rosters (if applicable)
- ETO (if used)
  - ✓ Entity Report or Advisory Council Roster
  - ✓ Efforts Report or Family Files/Folders; Home Visit and Scheduling Reports; Group Meeting Agendas, Flyers and Attendance Sheets; Staff Meeting Agendas and Attendance Sheets
  - ✓ Enrollment Report or Enrollment Roster
  - ✓ Home Visitor Basic Skills Assessment (future)
  - ✓ Home Visitor Knowledge and Skills Assessment (future)
  - ✓ Referral Report or Adult/child Referral Records
- Group Meeting Parent Evaluations
- Group Meeting Schedule (current and prior year)
- Group Meeting Topics Survey Summary
- Home Visit Logs (if applicable)
- *Pull Pages*
- Staff Job Descriptions
- Staff Performance Evaluations (coordinator and home visitors)
- Staff Supervisory Meeting Agendas (coordinator and home visitors)
- Staff Training documentation (on-going and initial, if applicable)
  - 15 hours for all staff
  - 24 hours additional for coordinators w/o a degree

### **Complete the Program Report or Accreditation Worksheet [see Addendum A]**

- Consult the Observation Forms and your notes
- It is recommended to use the worksheet continually to enter findings as you go through the processes listed above
- Enter
  - ✓ Comments to support your findings (being clear, without being harsh, will be of the greatest support to the local program)
  - ✓ Details of Creative strategies
  - ✓ Adaptations (note whether adaptations enhance programming)
  - ✓ Recommendations regarding required elements and best practices

### **Exit Conference with Coordinator (mandatory) and supervisor (mandatory)**

- Provide overall summary of programmatic strengths and deltas
- Inform them that the comments are based on observations and findings; this is their opportunity to refute, provide additional documentation or explain any findings they determine are inaccurate
- Review the Standards highlighting areas of particular creativity and fully explaining the reason for any Standard marked Insufficient/Not Present
- Remind them that HIPPY USA will review their adherence to the contractual obligations and notify them of any Accreditation determination
- Inform any site that has earned Program in Development status of the need to develop and submit a Program Improvement Plan to HIPPY USA or the State Office within 30 days of receiving your correspondence (Accreditation Worksheet/Program Report and cover letter)
- Tell them that you will forward a copy of the completed Accreditation Worksheet/ Program Report to the coordinator with a cc to the supervisor within 3 weeks

### **POST VISIT ACTIVITIES**

It is imperative that this last component be done with special attention to detail and timeliness. The site's ability to address any deltas in a timely manner is directly linked to their receipt of post visit correspondence. Your personal credibility and the credibility of the national or state office will be supported by well written documents, submitted promptly.

The HIPPY USA Site Visit Guidelines Chart should be followed in terms of submission timelines, documents as well as who should receive which documents. An abbreviated list of documents to be submitted follows:

- Cover letter to express appreciation for the site's hospitality and that summarizes the content of the appropriate report (Accreditation Worksheet or Program Report) *If correspondence is being forwarded electronically, the cover letter should be signed and submitted in pdf format*
- Accreditation Worksheet or Program Report
- Observation Forms (Home Visit, Group Meeting, Staff Meeting); Coordinator Key Roles & Responsibilities; Group Meeting Detail Form, if applicable
- Site Visit Contact Record (if some of the communication has been via email, attached copies of the emails to the Site Visit Contact Record)

## *Addendum A*

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### **ADDITIONAL GUIDANCE FOR VALIDATING STANDARDS**

- ❖ Wherever possible, validate with reports generated through ETO
- ❖ If program is not using ETO, validation is through hard copies of documents such as enrollment rosters, home visit logs, etc.
- ❖ When reviewing *Pull Pages*, randomly select from a roster of names or the actual files, being sure that the records are representative of all home visiting staff – the coordinator should not select which families will be reviewed
- ❖ There should be a minimum of two home visits with two different home visitors – visits should reflect languages being delivered – an Age 5 role play should be included wherever possible
- ❖ In instances where documentation does not reflect the balance of the year, it is permissible to review the previous year's (i.e., group meeting schedules)
- ❖ An observation of staff role play must include the inclusion of each "Key" at least one time. Recommendations should be made for any "Keys" or best practices that have been omitted and that would improve the quality of the training
- ❖ An observation of a home visitor role playing with a parent should include the "Keys". However, only recommendations should be made for how a home visit or group meeting role play may be improved.