

# Self-assessment worksheets

## Worksheet 1: Responsive and trusting relationships with families



Outreach &amp; awareness



Recruitment &amp; enrollment



Retention &amp; active participation



### Envision the ideal

Describe the ideal relationship you want to have with families. What does this relationship look like?

If it helps, think about times when your program successfully created responsive and trusting relationships with families during outreach and awareness, recruitment and enrollment, or retention and active participation (depending on which stage you are assessing). What did it take to establish this responsive and trusting relationship?



### Consider

The following practices promote *responsive and trusting relationships with families*. Think about the engagement stage you are focusing on. How much (or how often) does your program:

- / Use trusted messengers (relatives, friends, or community members whom families trust) to share information about the program
- / Respond quickly to eligible or enrolled families when they have questions or need help
- / Acknowledge that parents or caregivers are the experts on their children and have strengths and experiences that guide their goals and preferences
- / Give families a say when selecting services
- / Hire staff who can form strong positive relationships with families
- / Train staff who interact with families to be respectful and responsive
- / Consider family preferences for a home visitor; assess the home visitor–family match
- / Show sensitivity to negative experiences families may have had with other providers in the past
- / Use a strengths-based or trauma-informed approach with families
- / Train and supervise home visitors to have a two-way, responsive relationship with families by actively listening to and acting on their feedback
- / Assess whether families feel understood by and comfortable with their home visitor



## Reflect

Think about how the program builds relationships with families.

1. What does your program do well in terms of the practices listed under Consider? What program practices could you strengthen?
2. Does your program use these practices (or other strong practices) with some types of families more than others? What data or feedback support your conclusions about having responsive and trusting relationships with different types of families?
3. Do all staff or partners involved with outreach, enrollment, and services (depending on the stage you are assessing) use these (or other) practices? What are some reasons why staff might not be consistently responsive to families or might lose their trust?
4. What are some examples of how staff have successfully built responsive and trusting relationships? What practices from the above list (or others not listed) help the most?



## Rate

After reflecting on these questions, how would you rate your relationships with families?

We need to improve

We're good but could be better

We excel in this area

## Worksheet 2: Positive program reputation among families and community members

### ★ Envision the ideal

What does it mean to have a positive reputation in the community? What do you want your program's reputation to be? Think about different aspects of a reputation, including how well known the program is in the community, how satisfied families are with the program, and how well connected the program is within the community.



Outreach &amp; awareness



Recruitment &amp; enrollment

#### Tip

Strategy 3 (Section III) has ideas for how to better understand your program's reputation in the community.



### Consider

The following practices support a *positive program reputation among families and community members*. Think about the stage of engagement you are focusing on. How much (or how often) does your program:

- / Make various community members and partners aware of positive experiences families have with your program
- / Actively encourage word-of-mouth referrals from families you serve to build your program's reputation for participant satisfaction
- / Ask formal partners (such as those with a signed agreement) and trusted, informal partners (those you work with without a signed agreement) to spread the word about your program
- / Check that partners are giving families accurate information about what to expect from the program; check for the need to retrain partners if their staff turn over
- / Promote the program across your full service area (or the full area you prioritized for services)



## Reflect

Think about your program's reputation among families and community members.

1. What does your program do well in terms of the practices listed under Consider? Which program practices could you strengthen?
2. What are the positive views about your program's reputation? What are the negative views? How do you know this?
3. If the community is satisfied with and aware of your program, is this true across all the families and communities you aim to serve? Which communities does the program have a positive reputation with? Which ones do you think might view the program less positively?
4. What are some opportunities to strengthen the program's reputation among those families or communities where it is not as strong? How do the data or feedback your program gathers support these ideas?



## Rate

After reflecting on these questions, how would you rate your program reputation?

We need to improve

We're good but could be better

We excel in this area

## Worksheet 3: Program fit with and responsiveness to families' and communities' goals, needs, and expectations



### Envision the ideal

Consider (1) the types of families in your community you want to serve and (2) the families who are a good fit (and eligible) for your program. What does it look like to be responsive to their needs? What are families, ideally, hoping to gain from your program?



Recruitment & enrollment



Retention & active participation



### Consider

The following practices support *program fit with and responsiveness to families and communities' goals, needs, and expectations*. Think about the stage of engagement you are focusing on and what the program model or funder requirements allow. How much (or how often) does your program:

- / Ask for family and community input on service goals and needs, and apply their input to your program's services
- / Collect and review data to understand who you're enrolling and retaining, who you're not, and the reasons why you're not enrolling and retaining them, and compare these data with your priority groups or those who would be a good fit for your program
- / Clarify what families can expect from the program and address their concerns about home visiting
- / Co-create service plans with families that reflect what each family wishes to gain from the program; include other family members, as relevant, in service plans
- / Reassess families' goals, needs, and expectations and adapt individual service plans (such as for meeting basic needs, living in an unusually hot or cold climate, or after a change in their employment or housing)
- / Consider adapting or enhancing the home visiting model to fill gaps in meeting families' needs or goals (with permission from the model developer, if needed)
- / Create opportunities for families to socialize with one another to expand their own communities



## Reflect

Think about your program's fit with and responsiveness to families and communities.

1. What does your program do well in terms of the practices listed under Consider? Which program practices could you strengthen?
2. If your program is doing well in this area, is this true for all families you try to serve? Which families or communities do you face the most challenges with when it comes to fit and responsiveness? How do you know this—do you have data or feedback to support this conclusion?
3. If the program or staff are not consistently including these practices (or other strong practices) to support the program's fit and responsiveness, what is getting in the way? What opportunities do you see for including them more consistently or frequently?
4. What are some examples where staff have done the best job of working with families on their service plans or assessing whether the program is meeting a family's needs, goals, or expectations? What helped the staff the most in these examples?



## Rate

After reflecting on these questions, how would you rate your program's fit and responsiveness?

We need to improve

We're good but could be better

We excel in this area

## Worksheet 4: Program flexibility to meet family availability

### ★ Envision the ideal

Describe what it would look like to have maximum flexibility with families. What kinds of flexibilities are important to the families you serve or aim to serve? What flexibilities do you wish you could offer, in terms of where, when, or how often you interact with families?



Recruitment &amp; enrollment



Retention &amp; active participation



### Consider

The following practices promote *family availability and program flexibility*. Think about the engagement stage you are focusing on. How much (or how often) does your program:

- / Encourage staff to ask about families' preferences for meeting time, frequency, or location, and about other stressors or commitments they have (such as housing instability or work or school schedules)—when they first enroll and as their situations or preferences change
- / Discuss with model developers or funders ways to offer even more flexibility, if needed, including around meeting frequency, duration, and location
- / Offer options to families with scheduling conflicts (such as evening availability or another meeting location)
- / Draw on community resources to help families overcome stressors that may be affecting their participation (such as connections with housing support services, child care, or case management)
- / Encourage staff to try to re-engage families after they miss appointments
- / Allow families to pause rather than end services if they need to and the home visiting model allows it



## Reflect

Think about how your program promotes availability and flexibility.

1. What does your program do well in terms of the practices listed under Consider? Which program practices could you strengthen?
2. Which flexibilities do families benefit from the most? How do you know (do you have data or feedback to support your conclusions)? Are the flexibilities available to all families who could use them?
3. What reasons do families give for being unable to participate when they otherwise would like to join or stay in the program? How might your program help work around those issues?
4. What are some reasons you cannot offer families more flexibility? How might you work around those limitations?



## Rate

After reflecting on these questions, how would you rate your program availability and flexibility?

We need to improve

We're good but could be better

We excel in this area

## Worksheet 5: Tailored and easy-to-understand messaging and enrollment processes



Outreach &amp; awareness



Recruitment &amp; enrollment

### ★ Envision the ideal

How would you ideally tailor messaging and enrollment processes so they are easy to understand and navigate, as well as engaging to the different types of families you aim to serve? How might such changes strengthen program awareness and enrollment?



### Consider

The following practices promote *tailored and easy-to-understand messaging and enrollment processes*. Think about the engagement stage you are focusing on. How much (or how often) does your program:

- / Take the time to learn about the families you aim to serve and use appropriate language and images in your outreach materials for them
- / Develop outreach materials and messaging with input from community members and families you aim to serve to make sure you are emphasizing their interests and experiences
- / Use clear and specific language (in outreach materials or conversations) to explain all the service offerings and their benefits to families
- / Give families an accurate idea of what to expect; clear up misconceptions that referral partners or staff are relaying to families
- / Draw on a mix of passive (such as flyers) and active (such as direct conversation) outreach approaches
- / Make it easy for families to enroll by using an easy-to-use and clear application process (whether you are using a paper-based or web-based process)
- / Use a wait list when your program is full, along with supports and communication, to make the enrollment process smoother for families on the wait list



## Reflect

Think about how easy-to-understand your program's messaging and enrollment processes are to different families.

1. What does your program do well in terms of the practices listed under Consider? Which program practices could you strengthen?
2. Think about two types of families: (1) those your program usually enrolls and (2) those you have difficulty enrolling. Do you use the same or different messaging for these types of families? How well do these messages reflect the interests and experiences of each type of family?
3. Which practices from the list in Consider (or other strong practices) are most helpful for effectively communicating with families about your program? Does your program use these practices widely, with all types of families you want to enroll?
4. What are the main pain points for families in the enrollment process? How do you know (do data or feedback support your conclusions)? Why is it difficult to remove these pain points and how might you work around those challenges?



## Rate

After reflecting on these questions, how would you rate your messaging and enrollment process?

We need to improve

We're good but could be better

We excel in this area

## Worksheet 6: Strong and varied partnerships with smooth processes for referrals



Outreach &amp; awareness



Retention &amp; active participation

### ★ Envision the ideal

What would an ideal network of partners look like?

Think about times when your partners have helped link new families to your home visiting program or when your program has linked enrolled families to other services to meet their needs. Why were those efforts successful?



### Consider

The following practices promote *strong and varied partnerships with smooth processes for referrals*.

Think about the engagement stage you are focusing on. How much (or how often) does your program:

- / Partner with community providers or other referral partners that families can access (for instance, families can get to the provider and be seen soon after they are referred)
- / Conduct early and thorough screening to identify family needs; have partners that support those needs
- / Dedicate resources (including staff time) for ongoing partnership development
- / Develop infrastructure to support partnerships (such as memoranda of understanding, data use agreements, communication feedback loops, and shared partnership goals)
- / Develop, with each partner, referral processes that are agreed upon, clear and well defined, easy to follow, documented, and kept up to date
- / Train staff involved in referrals to use the documented processes; retrain staff if there is confusion or staff turnover
- / Train and support staff to maintain ongoing communication with partners (including warm handoffs and providing feedback about a referral, as applicable)
- / Identify and draw on existing collaboratives, coalitions, or centralized intake or referral systems that help coordinate care for families across service systems



## Reflect

Think about your referral partners and your typical approach for working with them.

1. What does your program do well in terms of the practices listed under Consider? Which program practices could you strengthen?
2. Do your referral partners effectively reach all families you aim to serve? Where are there gaps? How do you know? Do you have data or feedback to support your conclusions?
3. Can your partners meet all the service needs of your families? Where are there gaps?
4. If your program has smooth referral processes, which practices from the list above (or other strong practices that are not listed) are most helpful for this? Are these processes (or similar ones) used with all partners?

5. Are there opportunities to use formal systems in your community or state that connect families to services? For example, are there call centers, centralized intake or referral systems, systems of care, social services agencies, or other navigators or coordinators that help connect families to early childhood, health, and family support services? If these navigators can make referrals to or accept referrals from your program (depending on your engagement stage), how, if at all, can you more effectively use them?



### Rate

After reflecting on these questions, how would you rate your referral partnerships and processes?

We need to improve

We're good but could  
be better

We excel in this area

## Worksheet 7: Sufficient recruitment resources and timing of recruitment



Recruitment & enrollment

### Envision the ideal

How would you ideally use your resources for recruitment, including your staff's time and energy?

Think about a time when your program's recruitment was at its best. What level of staffing resources did it take to accomplish this? How long did it take for families to feel comfortable with program staff?



### Consider

The following practices promote *sufficient recruitment resources and timing of recruitment*. How much (or how often) does your program:

- / Adjust staff responsibilities or priorities so they have enough time for recruitment on top of their other duties
- / Enable extra opportunities, if needed, for families to build trust in the program and staff before enrolling
- / Acknowledge that families may be overwhelmed or preoccupied when staff first reach out, and have protocols for staff to try again when families may be ready
- / Know whether the model developer or funders allow for any flexibility for enrolling families who just missed the eligibility cutoff because they were recruited late in the eligibility window or needed time to decide whether to enroll
- / Help families connect to a different home visiting model or other services (at your organization or another) if they don't meet your eligibility criteria



## Reflect

Think about your program's recruitment resources and when you try to recruit families.

1. What does your program do well in terms of the practices listed under Consider? Which program practices could you strengthen?
2. Are staff appropriately dividing their time and effort across different types of families or locations throughout your service area (in keeping with your recruitment priorities)? How do you know (do data support your conclusions)? If not, what pain points are staff facing and how might you work around them?
3. Do families say they are interested in your program, but the timing is bad? How often does that vary depending on the type of family? How might you work around this challenge for those families?
4. How many interactions with staff are usually needed before families enroll in the program? What are the limitations and opportunities of having this number of interactions with all families you are recruiting?



## Rate

After reflecting on these questions, how would you rate your recruitment resources and timing?

We need to improve

We're good but could be better

We excel in this area

## Prioritize

Now that you've completed the self-assessment, what challenge will you tackle first? Don't try to improve everything at once. Follow these steps to help you prioritize one challenge or opportunity to focus on while action planning (Section III).

**1: Review your self-assessment ratings.** Use the ratings you recorded at the bottom of each self-assessment worksheet to identify the engagement factor(s) (that is, the worksheet titles) that most need to improve. Pay attention to major mismatches between your ideal and existing practices, or major differences in how you interact with certain types of families.

Use this space to record the factor(s) you think most need improvement:

**2: Answer the following questions to help you select a challenge or opportunity to start with.**

The questions will help you narrow the list of factor(s). If you prefer to use a group activity to prioritize a challenge, the tip box at the end of this section has some ideas.

**Thinking about the challenges and opportunities you identified:**

**Notes**

What is the team most **motivated** to address?  
Why is this important?

Is there a natural way to **order** the challenges?  
Which one is most urgent? Which one(s) are quick wins that can help your team build momentum or create the opportunity you would need to address a different challenge?

Do your **data** support one challenge as the most important to address? For instance, consider the number of participants or staff affected by the challenge.

What **resources** might help—or what barriers might hurt—your ability to address each challenge? Is your team prepared to use those resources to get ahead of the barriers? Think about your budget and possible requirements from model developers or funders, among other factors.

**Thinking about the challenges and opportunities you identified:****Notes**

What are some opportunities to address these challenges? Are they **realistic** in the short term?

**Who** would need to help develop and implement an action plan for each challenge, and are they available?

**3: Record your team's top priority.** This is the challenge you will focus on when writing a SMART goal and making and implementing the action plan (Sections III and IV). Be as specific as you can when you record the challenge. For example, instead of writing "Recruitment," you might write "Recruitment and enrollment of families who live in the more isolated parts of the service area."

**Tips**

**Still not sure which challenge to start with? Consider using these team activities to help you decide**

[What's on Your Radar?](#)<sup>4</sup> Each staff member prioritizes challenges based on what they think is most important, then they all review and rank the challenges as a group.

[Importance-Difficulty Matrix](#)<sup>4</sup> Staff rank challenges based on how important and difficult or feasible they are to address, then prioritize the ones that are both important and feasible. Importance reflects whether addressing the challenge would help engage more families; feasibility reflects whether the program has control over the challenge or the resources (staffing, financial, or otherwise) to address it.