

## Appendix H: FSH Annual Site Visit Outline

The annual site visit is a conversation between OEO and the FSH grantee around program highlights during the preceding year. It is an opportunity for joint problem solving around challenges and provides OEO with valuable information about training and technical assistance needs in the field. This document is intended to serve both as a conversation guide for the grantee and as a notetaking tool for OEO. It outlines the topics to be covered during the visit with discussion questions for each.

### **Annual Site Visit Objectives:**

- Foster open communication and mutual respect between OEO and Grantee
- Celebrate strengths and successes
- Provide an opportunity to discuss and analyze program performance data
- Problem solve around needs that arise between triennial visits
- Review progress on goals set in previous monitoring visit, if applicable
- Set program goals for the coming year
- Discuss training and technical assistance needs, if applicable

### **Visit Date:**

### **Staff Present (list):**

### **Year in review - Celebrate strengths and successes**

What were your program's greatest strengths in serving families during the past year? What are you most proud of?

Discuss a family success story that highlights your program's strengths.

Describe a new partnership, initiative or event from the past year and how it contributed to your program's success.

### **Review of Previous Monitoring Visit**

Discuss goals set in previous monitoring visit (triennial or annual) and progress made in the past year.

Have there been barriers to meeting goals set in the last annual monitoring visit? If so, please describe.

What would help address these barriers? What support do you need?

### **Review of Program Performance Data**

In reviewing performance measure data from the previous year, which results stand out? Why?

What story do you think the past year's numbers tell?

Tell me about a time when a participant exited unsuccessfully. What did that look like?

What about your local program do you think could be built upon or improved? What is one step you could take towards this in the coming year?

Describe the population your local program serves. Do you notice demographic trends or patterns? How does this inform the way you serve families enrolled in the program?

### **Housing Stability**

Describe how your program gets families housed. What are your go-to resources?

Have there been specific challenges in finding and retaining housing with program participants?

If you could make one change to your local program that would help more families find stable housing, what would that change be? How would you implement it?

What does your most recent provider progress report tell you about how your local program is housing families? What story do the numbers tell? What should we know that isn't reflected in the numbers?

### **Onboarding / Staffing**

Have any service coordinator positions turned over in the past year? If so, how have you used the FSH onboarding guidance in bringing staff aboard?

If you haven't experienced FSH staff turnover in more than a year, what do you think accounts for this? Has your program made changes that are resulting in better staff retention? If so, please describe.

Describe how you help service coordinators maintain wellness. What do you do to help service coordinators with the effects of vicarious trauma? How do you help service coordinators maintain appropriate boundaries with the families they serve?

How do you handle service coordinator vacancies? Do you have a staff coverage plan in place? If so, please describe.

Has your program consistently maintained a caseload within the parameters required by the grant? If not, what were the barriers? What is your plan to remedy this?

### **Partnerships**

Describe your strongest community partnerships? How they help you serve families?

Describe a new areas where you would like to partner or a partnership that could be built upon. What kind of support do you need to do this?

Describe your relationships with local housing partners. What makes them effective? Is there anything about them that could be improved?

How have things been going with your child welfare partnerships? What can your program do to continue building on these relationships?

### **Other**

What support that you receive from OEO has been most useful? Is there additional support you need?

Is the Medicaid billing and reimbursement going smoothly? Please described any challenges your site has encountered.

What haven't we discussed today so far that you would like to highlight?

### **Goal Setting**

Has something come up in our conversation that you want to set goals around? If so, describe.

If you identified more than one goal above, which are the highest priorities for your program to address? What kind of support would be helpful?

Describe goals with action steps and deadlines below:

OEO Staff Signature

FSH Site Supervisor Signature