Health Component: Tracking, Reporting and On-going Monitoring

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Learning Objectives

• Health manager’s role in tracking and recordkeeping
• Explore ways to foster tracking and recordkeeping skills
• Identify available resources to support staff in recordkeeping and tracking

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Learning Objectives

• Understand the role Health managers play in supporting the effective use of health data
• Get to know the four data activities
• Learn the difference between compliance and performance
• Learn how to use data in planning and decision-making
Tracking and Recordkeeping

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HEAD START
Regional T/TA Network
A program must develop a system to track referrals and services provided and monitor the implementation of a follow-up plan to meet any treatment needs associated with a health, oral health, social and emotional, or developmental problem.

Neither the Office of Head Start nor the National Center on Early Childhood Health and Wellness endorse any one particular Management Information System or tool.

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Tracking Systems Used in HS and EHS
What comes to mind when you think of health tracking and recordkeeping?
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Health Manager’s Role

1. What’s involved in this role?

2. What challenges might you face?
Using Data: Health Manager’s Role

• Gather and use health data
• Understand the health status of children
• Use data to tell a compelling story
• Present data in a way that promotes strategic decision-making
• Report appropriately internally and externally

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What are the sources of health & safety data that are tracked and recorded?

• Well child visits (EPSDT)
• Oral health visits
• Follow up visits for identified issues
• Individual child health or service plans
• Nutrition related information
• Developmental screenings
• Ongoing assessments
• Child & family demographics

• Daily Health Checks
• Family partnership agreements
• Family referrals to community resources
• Program self-assessment information
• Injury reports
• Safety checks
• Pregnant mother visits
Data

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Group Activity: Tracking Data on Health and Safety

- What are some strategies and best practices for health tracking and recordkeeping?
- What tools do you use?
- Who do you work with?
- What are some success stories?
- What are some challenges?

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Useful Data

In order to be useful, data must be presented to decision-makers in such a way that they can relate to the data and act upon the information.
Data Activities

1. Prepare
2. Collect
3. Aggregate and Analyze
4. Use and Share

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Prepare
Collect
Aggregate and Analyze

What do I want to know?

a) How many children were enrolled last month?
b) How many of those were screened?
c) How many children left the program?
d) How many children do I currently have enrolled?
e) How many of those are screened?
Aggregate and Analyze

What do I want to know?

a) How many children needed referrals?
b) Referrals for what?
c) How many received treatment?
d) How many are still needing treatment?
   Of these, what are the reasons for not completing their treatments?
Aggregate and Analyze

What do I want to know?

a) What can I do differently to improve these numbers?
b) What would I need?
c) Who should I inform of this?
d) Who could help me with this?
Use and Share
Moving with Tradition
Reporting
You are a Manager

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Managing to Achieve Results

Data → Make decisions → Improve program quality → Better outcomes
Compliance vs Performance

Compliance
We followed all the rules

Performance
Look at what we accomplished!
Ongoing Monitoring
On-going monitoring

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Elements of an Effective Ongoing Monitoring System

- Quality data
- Culture that understands the importance of continuous improvement
- Process for aggregating and analyzing data
- Skilled managers who embrace their monitoring responsibilities
- Process for correcting issues and replicating promising practices
Elements of an Effective Ongoing Monitoring System

Skilled managers who embrace their monitoring responsibilities

- Culture that understands the importance of ongoing monitoring
- Process for aggregating and analyzing data
- Process for correcting issues and replicating promising practices

Effective Ongoing Monitoring
Elements of an Effective Ongoing Monitoring System

Quality data

Effective Ongoing Monitoring

Process for aggregating and analyzing data

Process for correcting issues and replicating promising practices

Skilled managers who embrace their monitoring responsibilities

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Elements of an Effective Ongoing Monitoring System

A culture that understands the importance of continuous improvement

- Effective Ongoing Monitoring
- Skilled managers who embrace their monitoring responsibilities
- Process for correcting issues and replicating promising practices
- Quality indicators and data

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Elements of an Effective Ongoing Monitoring System

Efficient process for aggregating and analyzing data

Quality data

Skilled managers who embrace their monitoring responsibilities

Effective Ongoing Monitoring

Process for correcting issues and replicating promising practices

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Elements of an Effective Ongoing Monitoring System

- Quality data
- Skilled managers who embrace their monitoring responsibilities
- Effective Ongoing Monitoring

Process for correcting issues and replicating promising practices
On-going monitoring

**Lead with strengths**
What does the data show is working well?
Why does it work well?

**Identify the challenges**
What’s not working well?
Why is it not working well?

**Analyze data through dialogue**
What aspects of “what is working” can be used to find a solution?
What factors have been considered in reaching a solution?
What else do we need to know before we decide?

**Make course correction**
What changes do we propose?
Will the changes help us comply with regulations?
Do the changes advance our goals?
Who is responsible for implementing?

**Check-in & follow up**
What data will we need to review and how often?
How will we make sure the changes are working?
Is it a short-term or long-term solution?
Program Planning Cycle

Every five years:
Establish long-term goals and measurable objectives
Annual: Review goals and objectives

Conduct or update community assessment

Respond regularly with course corrections

Create an action plan and budget that reflect goals

Implement an action plan

Analyze progress and compliance through ongoing monitoring

Evaluate progress through the annual self-assessment

As the program planning cycle shows, programs use the five-year planning process to develop, monitor, and evaluate progress toward strategic long-term goals.
Linking Planning, OGM, and SA

Program Planning

**Decide on goals**
- Review and analyze Community Assessment & other relevant data
- Review recommendations from SA report
- Develop long-term program goals

**Develop objectives**
- Set short-term program & fiscal objectives

**Develop plan of action (work plan)**
- Develop action steps for objectives
- Identify measures to monitor (prepare for data collection)
- Plan for regular progress reports to staff, GB and PC
- Develop service plans assuring they reflect new goals/objectives

Ongoing Monitoring

**Collect:**
- Collect data (PIR, child outcomes data, results of OGM for all systems, services, goals & objectives.)

**Analyze:**
- Review & analyze data with managers

**Act:**
- Make course corrections
- Determine new data measures

**Ensure:**
- Evaluate & follow up on course corrections
- Verify accuracy of and summarize OGM data for review by SA team
- Request SA team to analyze persistent systems issues

Self-Assessment

**Prepare:**
- Design Self-Assessment process
- Orient & train Self-Assessment participants

**Analyze:**
- Analyze information presented (OGM summaries, OHS monitoring results, other info needed)
- Determine and request if further info is needed

**Recommend:**
- Identify strengths and make recommendations for improvement & enhancement
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