TRIBAL HOME VISITING

Data Collection in the Home

A TEI Toolkit

Module 2: Preparing for Data Collection

TRIBAL EVALUATION INSTITUTE

Supporting Community Decision Making by Strengthening Data Collection and Use

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This toolkit was developed in response to needs and questions related to data collection that emerged through TEI's work with Tribal MIECHV grantees. TEI members from two institutions collaborated to create this toolkit: **James Bell Associates, Inc. (JBA)**, and **Johns Hopkins Center for American Indian Health**.

Please contact us with any questions related to this toolkit and its use.

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MODULE 2: PREPARING FOR DATA COLLECTION

This module gives program managers and evaluators tools and tips to prepare your program team to effectively collect data. As with most tasks, good planning can ensure that the data you collect are worth the effort. This section outlines some of the questions you need to think through to develop a thorough plan for collecting data. In the context of these questions, we will discuss the hiring of staff who will collect data, the data collection protocol and how to use it, and issues related to scheduling and completing data collection activities. We will also describe some strategies for doing the day-of preparation needed to successfully collect data in the home and will address ways to support data collection staff through training and supervision.

The planning process is often a team effort. You may be working with your own internal staff and/or an advisory board; you may be working with outside evaluators, such as university partners or independent consultants. No matter who makes up your team, you can use these tools to help you prepare to collect reliable data.

LEARNING OBJECTIVES:

By the end of this module, you will be able to:

- Understand and use an array of tools to prepare for data collection within your home visiting program.
- Consider issues to discuss with your funder, model developer, local agency and community when determining what data to collect and which tools to use.
- Build protocols and scheduling tools for your program to support uniform data collection across program staff.
- Understand ways to support data collection staff through training.

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Part of planning for data collection is figuring out how to efficiently collect data. How much data does your program really need? How often do you need to collect data? How much time do families have to answer questions? You might be concerned about collecting too much data, which might affect family engagement in your program and in data collection specifically. Asking too many questions, or the same questions repeatedly, might strain the home visitor–family relationship. We want to help you plan for data collection that is as efficient as possible.

When you begin data collection, you will need to answer a few key questions:

- What data will you collect?
- Who will collect your data?
- Where will you collect your data?
- How will you collect your data?
- When will you collect your data?

WHAT DATA WILL YOU COLLECT?

The first step to planning data collection is establishing a clear understanding of the data requirements for the program from the funder (to allow for performance measurement), the model developer (to assess implementation fidelity), or the local agency and community (to enhance local reporting). While these requirements do not prevent your program from collecting additional data, having a clear understanding of the basic requirements will get you started.

In addition to understanding the funder's data reporting requirements, it is a good idea to work with the developer of your program's home visiting model. Some model developers provide extensive guidance on data collection, whereas others do not. The developer can sometimes provide you with information to inform your planning. For example, you can learn about any tools that are required or recommended when using the model. Also, you can find out if the model developer has a data collection system in place that you can use in your program. To start this conversation, you might consider asking the developer the following questions:

1. What outcomes are expected among families receiving this model?

2. What data (if any) are required to be collected and reported back to the model developer?

3. What forms and logs does the model developer provide to track participant progress and data collection?

4. What technical assistance does the model developer provide on data collection, data management, and evaluation design?

5. Does the model developer have a data collection system that can be used by programs implementing the model?

It is also important to consult your agency's data reporting requirements and involve partner agencies early in the data collection planning process to explore options for sharing data. Sometimes data already collected by partner agencies can be accessed through data-sharing agreements with them. These arrangements can reduce the data collection burden for your families and staff. Knowing what data these partner agencies already collect can help you decide whether or not to use the same data for your program. For example, if another agency in your community administers the Ages & Stages Questionnaire (ASQ) and some of your program's families participate in the other agency's program, you can save your program and the family time by partnering with the other agency to obtain the results instead of administering the tool twice. This strategy requires coordination in the planning stage to make sure that the timing for administering the tool works for both programs. Your program should also make sure to eliminate any redundant data collection (i.e., same questions on different forms) within your program and across your community programs.

WHO WILL COLLECT YOUR DATA?

TOOLS:

2.1: Home Visitor Position Description

It is important that the staff members responsible for collecting data are a good fit for the role and have training and supportive supervision. You can include expectations around data collection as part of your hiring process. Clearly explain data collection responsibilities before staff are hired so they understand that they will be expected to collect data and do so following specific protocols. We have provided you with a sample **Home Visitor Position Description** that describes potential home visitor data collection tasks.

Your team will need to decide which of your staff are best suited to collect the highest quality data. In most home visiting programs, home visitors collect data with the individual families in their caseload. Sometimes, when enough staff are available, programs will have certain staff teach lessons (home visitors) and other staff collect and enter data. One advantage of this option is that it helps ensure the accuracy of the data collected; the relationship home visitors have with families may influence the way data are collected and result in biased data. Another advantage is that the data collection does not impinge on the home visiting lessons. The downside of assigning data collection to staff other than home visitors is that some families might not feel comfortable sharing information with people they do not know. This strategy also requires resources for multiple positions. In some programs, it may be necessary to have different people collect different types of data. For example, the program manager or evaluator may collect intake data or data related to the rigorous evaluation, while the home visitors may collect performance measurement data.

WHERE WILL YOU COLLECT YOUR DATA?

For home visiting programs, data will usually be collected in the family's home. As such, data collectors need to be prepared to collect data with the typical distractions found in a home environment. They might need to bring toys to entertain children and be ready to explain to other family members why they are collecting data. Finding an area of the house that is private can be hard, and staff need to be able to politely explain the importance of privacy to other family members. When privacy cannot be found in a home, or if the family is uncomfortable for any reason, it might be best to collect data in an office. There are many strategies for data collection in the "real world," but it takes some planning ahead. As a team, decide what will work best in your community.

TOOLS:

2.2: Data Collection Materials Checklist

Day-of Data Collection Preparation

Often you will need a variety of materials and/or equipment to collect data. In most cases, you will need to be prepared to collect data in the participant's home rather than an office. We have provided a **Data Collection Materials Checklist** to help you do a mini-inventory prior to data collection. This checklist mentions many of the items you may need for a home visit that includes data collection.

HOW WILL YOU COLLECT YOUR DATA?

Data can be collected in many ways. You can read the questions aloud to participants like an interview or you can ask participants to complete forms and tools on their own. Your program can purchase Audio Computer-Assisted Self-Interview (ACASI) software (described further in Module 3) that allows participants to complete a questionnaire using a laptop and headphones. In addition, home visitors can carefully observe the family and complete an observational tool or checklist. For any method of collecting data, there needs to be consistency across data collectors, which is called reliability. Home visitors need to be able to explain the data collection, questions, and terms to participants in the same way to ensure that participants' answers are not influenced by varying explanations. Discussing data collection during supervision and refresher training can help home visitors collect data consistently.

TOOLS:

2.3: Data Collection Protocol Outline

The Data Collection Protocol

It is essential that all people who are collecting data for your program do it in the same way. A data collection protocol is a document that details all the steps for collecting data. It can help ensure that data collection practices are consistent across staff members. We have provided an outline of the sections that are generally included in a data collection protocol in the **Data Collection Protocol Outline**.

WHEN WILL YOU COLLECT YOUR DATA?

A *data collection window* is a predetermined time frame for completing an assessment. An example is completing a depression screen within 30 days of enrollment.

Part of your preparation should include a data collection schedule. Your team should strive to collect data as close to the scheduled timepoint as possible. Many of the tools and screeners that programs use to collect data in home visiting are time sensitive. Generally, there is a "window" of time in which data should be collected for each tool. For example, data may be collected when an expectant mother is 36 weeks pregnant, 2 months after her baby is born, 6 months after her baby is born, and 12 months after her baby is born. Further, the protocol may specify that the data should be collected within a certain period of time (e.g., 1 month) on either side of each timepoint. Your program needs to decide what the window of time should be to administer each form or assessment. You will need to consider the overall data collection schedule, whether the assessment is age specific (e.g., a child development scale), and where the family is in its participation in the program.

In home visiting, timely data collection isn't just about evaluation and data. Timely data collection can help families. When you plan data collection ahead of time, you ensure you have the data you need to help your families in a timely manner (such as getting them access to the services they need as indicated by screening instruments) as well as get the data you need for evaluation or performance measurement purposes.

Once you have your tools and the timeline for their administration identified, your next step is to create a data collection scheduling system. A scheduling system will help you collect information and administer assessments at the correct timepoints. It can also help supervisors support data collectors by monitoring data collection scheduling and completion over time. A tool like the Data Collection Schedule Tool introduced below can help program staff keep track of multiple data collection timepoints across all the families in the program. This task can be a real challenge without the help of an automated tool or tickler that alerts a home visitor or other staff person when data should be collected.

TOOLS:

2.4: Data Collection Schedule Tool

We have included a **Data Collection Schedule Tool** and instructions for customizing it for your program. This tool is an Excel file template. After you set up the tool for your program, it will calculate exact dates for when to collect data for each participant. You can also use the tool to prepare and plan data collection activities. Supervisors can use the tool to make sure that data collection activities are taking place as planned. Your TEI liaison is prepared to help you throughout the set-up stage. You can also use other tools for scheduling and tracking, such as the Microsoft Outlook calendar feature or a free online calendar. You might be able to program your data system so it sends reminders about scheduled data collection visits.

TOOLS:

2.5: Data Element Tracking Form

We have also included a tool, the **Data Element Tracking Form**, you can use to keep track of all the data elements included in your program's data collection plan. Completing the table ensures that all the required data elements are addressed in your plan. It can also help staff locate data when it is time for reporting.

What happens if I don't follow the schedule? Sometimes it will be impossible for your team to follow your data collection schedule. Before you get off schedule, it is important that you have procedures in place for when a data collection visit is overdue. One strategy you can use is to determine a final date in the data collection window after which you will stop attempting to collect the information for that time period. For example, you could stop attempting to collect data for a given data collection timepoint after 30 days. Whatever the end of the data collection window is, you will need to document why data were not collected at that time so you can provide that information when you report your performance measurement data or write your evaluation report. It can be challenging to remember the details about these situations when reporting data months later.

Example of missed 6-month data collection explanation: Mom had surgery on May 13 and anticipated being out of the hospital in time for the 6-month data collection, which was due on May 15. Unfortunately, mom took longer to recover than expected and was not willing/able to schedule with me. I attempted to schedule once a week through the time period (6/4/2013 3pm, 6/10/2013 9am, 6/13/2014 11am). I talked to mom on 6/20, and she has agreed to the visit on 6/22.

TRAINING STAFF TO COLLECT DATA

TOOLS:

2.6: Sample Training Schedule

ACTIVITIES:

2.1: "In Your Own Words" Exercise

2.2: Jeopardy Games

2.3: Becoming Familiar With Your Data Collection

Before you or others on your staff are ready to collect data independently, you will need thorough training. Usually a person with experience in evaluation, data collection, and the specific home visiting protocol conducts the training on data collection for a home visiting program. Depending on the scope of your data collection activities, the data collection training period can take 20–40 hours, plus ongoing "refreshers." Whenever possible, you should separate data collection training from curriculum training (when home visitors learn how to teach lessons and conduct home visits). The **Sample Training Schedule** lists example training topics related to data collection.

The activities at the end of this module—**"In Your Own Words" Exercise, Jeopardy Games, and Becoming Familiar With Your Data Collection Instruments**—can be used during training opportunities to make the process a little easier. Just like learning the home visiting lesson content, learning the process of data collection takes practice!

MODULE SUMMARY

Thoughtful preparation is essential for effective data collection. Planning for and determining the "who, what, when, and how" of data collection early in the process is necessary to support quality data collection within your program. Once these questions have been answered and formalized in written protocols and schedules, it is important that home visiting staff are trained in collecting high-quality data and are given ongoing support.

Make sure you celebrate data collection accomplishments and handle mistakes in a way that encourages improvement and doesn't undermine confidence in or commitment to the overall effort.

In the next module, we will discuss the importance of supervision and regular data quality checks to ensure the data your program is collecting are of high quality.

APPENDIX

DEFINITIONS OF KEY TERMS

Key Term	Definition
Confidential	When data is confidential, it is kept secret through restrictions on the way it can be collected, stored and shared. Data that identifies individuals is kept confidential and not shared with the community. Only the home visitor, his or her supervisor, and team members (and potentially the evaluator) will see confidential data. Individuals who collect data will explain who is allowed to see identifying information and what steps they will take to keep it confidential.
Data Collection Protocol	A document that details all the steps for collecting data, helping to ensure that data collection practices are consistent across all staff members.
Data Collection Window	A predetermined time frame for completing an assessment. An example is completing a depression screen within 30 days of enrollment.
Reliability	The degree to which a measurement tool produces stable and consistent results.

ACTIVITY INDEX

Activity	Purpose of Activity
2.1: "In Your Own Words" Exercise	Using various scenarios, practice discussing data collection as you would with families.
2.2: Jeopardy Game	Test and refresh knowledge of data collection and your program's data collection protocol.
2.3: Becoming Familiar With Your Data Collection Instruments	Become familiar with all the data collection instruments used at your program and practice discussing them as you would with families.

ACTIVITY 2.1: "IN YOUR OWN WORDS" EXERCISE

Families in tribal communities may have many questions about data collection, such as how the information will be used and how it will be kept confidential. (Module 3 describes confidentiality in detail.) This issue is often the subject of the first conversation that happens at intake between a home visitor and a family that is enrolling in the program. It's important to recognize that not all home visitors have the same background or experience in describing data collection in their own words. This activity provides an opportunity to practice conversations with families before actually stepping out in the field and asking the first question.

Instructions: Arrange trainees in groups of three to practice introducing data collection activities to families. Each group will complete each of the three practice scenarios, rotating roles as they go. Each scenario has three roles:

- Home visitor
- Mother
- Other family member

Allow 1 hour for this exercise (15 minutes per scenario and 15 minutes to bring together all the trainees for larger-group shared learning). In the larger group, focus on the strategies that worked well for each group.

Scenario 1: Introducing Data Collection

Roles: Home visitor, mom, and grandmother. Depending on which situation is more appropriate for your community, either role play that all three women are fluent in their tribal language or that the home visitor and grandmother do not speak the same language.

Scenario: The family has been referred to your program for home visiting services. The mom is in her teens and is pregnant with her first child. Her boyfriend, the father of the child, is not really involved but still lives in the community. The mom's parents are supportive and live down the street. The mom finished her sophomore year in high school and is now on summer break but hopes to return to school in the fall.

The mom lives with her grandmother who is helping to support her. The grandmother is participating in this initial home visit and will be participating in many of the visits. The grandmother is very well respected in the community, and her husband, who is now deceased, was a member of tribal council many times throughout his life. She is very active in cultural activities throughout the community and is a godmother to many children in the tribe. English is her second language, and she speaks mostly her Native language to her children and grandchildren. The mom clearly understands her Native language but responds in English.

Guidance for the home visitor: Introduce the data collection activities in your program in a way that both the mom and grandmother will understand. Respond to questions as they come up. Try different ways to explain data collection terms in everyday language.

Scenario 2: Not Comfortable Sharing Information

Roles: Home visitor, mom, and dad

Scenario: Mom and dad have come in to enroll in home visiting services. They have been referred to the program by a tribal judge because they have been struggling with domestic violence and substance abuse. The mom is 36 weeks pregnant and has two other children (ages 4 and 7) from a previous relationship.

The home visitor is from the community and knows members of the dad's family personally. She knows that the couple's struggles have been hard on the whole family and that the family is often a topic of discussion in the small community. When the home visitor introduces data collection, she notices that both the mom and dad seem uncomfortable with the idea of sharing personal information.

Guidance for the home visitor: Address concerns about confidentiality. Think about how to explain these issues to someone who you know in a tight-knit community. Reinforce for the family that the program is voluntary; even if a judge referred them, they do not have to participate.

Scenario 3: Too Much Data?

Roles: Home visitor, mom, and cousin

Scenario: The mom is 26 weeks pregnant with her first child and is enrolled in the program. She is 22 and happy to be pregnant but a little overwhelmed because she is trying to finish community college classes. She studied early childhood education her first two years in school but then transitioned to a health tech program so she will be able to work in a hospital doing patient care.

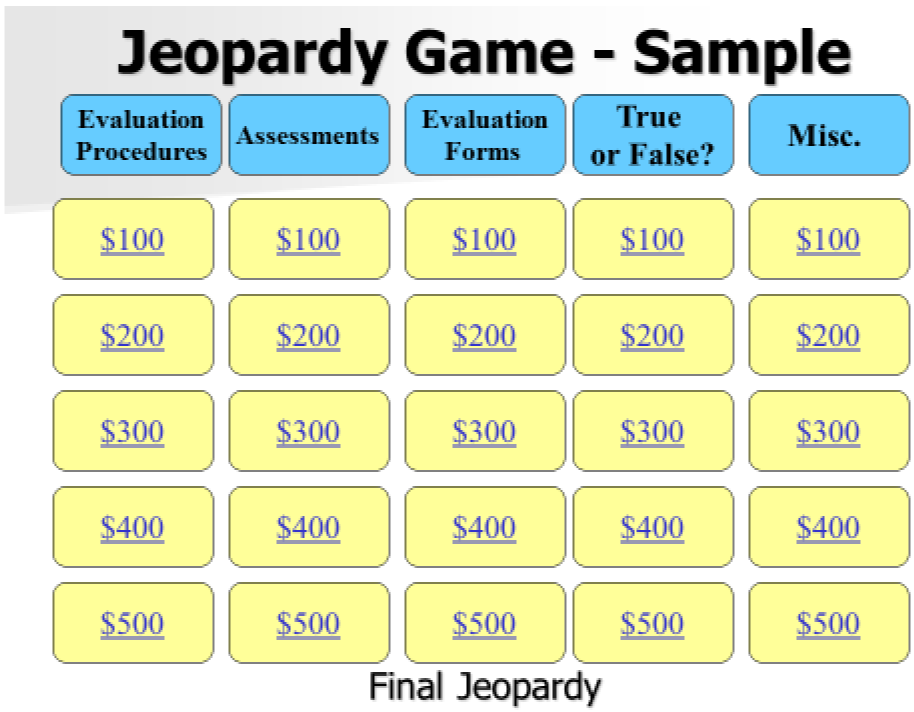
She has known the father of her child since high school. They plan to get married in their tribe's traditional way after the baby is born. He is a truck driver and is often out of town. Her cousin lives down the street and is a constant companion. The two women seem excited about the new baby.

The mom knows about data collection from her own training program and seems a little concerned about having to provide so much data. It feels to her like a lot of questionnaires, and she isn't sure she wants to deal with all of it. As a student she participated in a research study; she found the interviews really boring, and she never heard anything back from the interviewer.

Guidance for the home visitor: Try to explain to the mom why it is important to collect this information and address her concerns.

ACTIVITY 2.2: JEOPARDY GAME

Keep trainings on data collection fun by incorporating games like Jeopardy. See the accompanying PowerPoint example of a Jeopardy game with questions on data collection. Modify the game to include questions on your program's data collection protocol.



ACTIVITY 2.3: BECOMING FAMILIAR WITH YOUR DATA COLLECTION INSTRUMENTS

This two-part activity is intended to support the home visiting team's awareness of the data collection plan, the data collection tools being used by the program, their purposes, the participants who will complete the tools, the timing of their administration, and the ways the program will use the data that are collected.

Preparation: Print blank copies of each data collection instrument home visitors will be using during home visits with families. Create a binder or folder with at least one copy of each instrument to provide to each team member.

Part 1. Instructions: For each instrument, complete the fields below. Be prepared to discuss and compare your answers with the group.

NAME OF THE INSTRUMENT:

____

WHAT IS THE TOOL'S INTENDED PURPOSE?

____

WHAT PARTICIPANTS WILL COMPLETE THIS TOOL?

____

WHEN/HOW OFTEN SHOULD THIS TOOL BE ADMINISTERED?

____

IS THERE A WINDOW FOR DATA COLLECTION?

____

HOW ARE THE DATA COLLECTED?

____

WHERE ARE THE DATA STORED?

____

HOW IS YOUR PROGRAM GOING TO USE THESE DATA/WHAT WILL THE DATA TELL YOU?

____

HOW COULD YOU INTERPRET THE DATA AND USE THE DATA WITH FAMILIES?

____

Part 2. Instructions: For each instrument, get in pairs to role play. One person will act as a home visitor administering the instrument, and the other person will act as a mother/father/caregiver enrolled in your program. As you are playing the mother/father/caregiver role, pose questions to the home visitor that a typical family enrolled in your program might have about that particular instrument, the way it's administered, or the uses of the data collected. After a few minutes, switch roles. The goal of this activity is to help home visitors become familiar with the data collection tools they will be using, making sure they are able to clearly introduce and describe them to families.

TOOL INDEX

Tool	Type of Tool	Purpose of Tool
2.1: Home Visitor Position Description	Sample	Provides sample language for a home visitor job posting, including a description of data collection duties.
2.2: Data Collection Materials Checklist	Checklist	Serves as an inventory tool for maintaining an "office in a box."
2.3: Data Collection Protocol Outline	Outline	Provides an outline of sections that can be included in a data collection protocol with explanations describing each major section.
2.4: Data Collection Schedule Tool	Modifiable Excel Template With Instructions for Customization	Allows home visitors to track their data collection activities and supervisors to support home visitors in keeping up with data collection schedules. This spreadsheet can pre-populate target data collection dates by participant.
2.5: Data Element Tracking Form	Template	Provides a table to track all the data elements included in the data collection plan. Completing the table ensures that all data elements are addressed and will help staff locate data when needed for reporting.
2.6: Sample Training Schedule	Sample	Provides an example of a training schedule for home visitors that addresses issues related to data collection.

TOOL 2.1: HOME VISITOR POSITION DESCRIPTION

Note about the tool: This tool shows how data collection responsibilities and experience (shown in bold) might be included in a position description. This sample position description lists the roles of a home visitor, but the same data collection responsibilities could be listed in descriptions of other positions. All language/structure is provided as an example and should be revised to meet the specific needs of your program and the context of your community.

SAMPLE TEMPLATE INCLUDING DESCRIPTION OF DATA COLLECTION DUTIES

ORGANIZATION NAME:
POSITION TITLE:
POSITION CATEGORY (E.G., FULL-TIME, PART-TIME):
CONTACT PERSON:

Brief paragraph describing the organization's mission.

Brief paragraph describing the home visiting project.

Brief paragraph describing the Home Visitor position. *(Example: The Home Visitor works for the Northwest Health Center as part of its early childhood home visiting project team. This is a full-time position that reports to the Home Visiting Program Manager. Project activities include family-based outreach and education, travel to local homes by car, and completion of data collection documentation. Attention to detail and good communication and interpersonal skills are required.)*

POSITION RESPONSIBILITIES

- Attend community meetings to represent the project and maintain contacts with community partners
- **Recruit eligible families to participate voluntarily in the project and evaluation**
- **Administer informed consent**
- Attend trainings and meetings, which sometimes require overnight travel
- Travel to and conduct home-based sessions with parents and children to teach about parenting, child development, life skills, and living healthy
- Provide support and assistance to families in living healthy and caring for their young children
- Connect families to appropriate community resources
- **Collect data and review for document accuracy and processing as needed**
- Provide follow-up services to families as outlined in the program protocol
- **Work with the project team on duties related to the general conduct of the program and evaluation and participate in staff meetings to review project goals and progress**
- **Update program logs and perform data entry as needed**

- Assist with other organization-wide programmatic duties as needed

This description is a general statement of the major duties required to be performed on a regular, ongoing basis. There may be other duties as assigned.

Requirements/Preferences

Education and Experience

- High school diploma required; bachelor's degree preferred (experience may substitute for education)
- **Experience working with public health interventions and data collection**
- Working knowledge of home visiting projects preferred
- Experience working within Native populations

Skills

- Strong interpersonal and communication skills
- Ability to speak local language
- Ability to work efficiently and with attention to detail
- Ability to learn and work independently
- Flexibility and adaptability
- Ability to effectively multitask
- Excellent professional judgment and discretion
- Good oral and written communication skills
- Ability to operate a telephone, printer, fax, copier, and computer
- Experience in Microsoft Word, Excel, and PowerPoint
- Ability to drive a project vehicle as needed and to follow guidelines on vehicle use

TOOL 2.2: DATA COLLECTION MATERIALS CHECKLIST

Materials needed for a data collection visit may include the following:

- ☐ **Map.** Includes location and directions to the home.
- ☐ **Contact Information Form.** Contains the contact information for the family (e.g., names, phone numbers, email addresses) so the home visitor can try to reach family members if they are not home as planned. It is also used at each visit to update contact information if there is a change.
- ☐ **Visit Summary Form.** Summarizes the details of the visit, such as date, time, individuals present, activities completed, notes, concerns about participant, and follow-up items.
- ☐ **Incentive.** Gift card or other incentive that may be given after a data collection visit is complete.
- ☐ **Incentive Log.** Tracks when a participant receives a gift card or other incentive. The entry in the log should be signed by each participant who receives an incentive.
- ☐ **Informed Consent Forms.** For use by the home visitor as a reference if needed.
- ☐ **Community Resource Guide.** For use by the home visitor as a reference if needed. Emergency resources should be highlighted to be contacted and/or shared with the family.
- ☐ **Data Collection Protocol.** For use by the home visitor as a reference if needed.
- ☐ **Instrument Instructions.** For use by the home visitor as a reference if needed.
- ☐ **Instruments.** Hard copy and/or electronic forms of all data collection instruments. If using a laptop or tablet to collect data, the home visitor should bring a hard copy of all forms as a back-up.
- ☐ **Props for Instruments.** Toys and other required props to screen for developmental delay, scale to measure weight, and blood pressure cuff to measure blood pressure.
- ☐ **Pens and blank paper.** For use if needed.
- ☐ **Entertainment for children.** May include board books (for smaller children) and/or coloring books and crayons (for older children) to keep them occupied while the caregiver is being interviewed, if appropriate.

If collecting data electronically, the following may be needed:

- ☐ **Audio recorder** with extra batteries.
- ☐ **Laptop computer and/or tablet** with charged battery, power cord, car charger, external mouse (if needed), and headphones (if needed).

TOOL 2.3: DATA COLLECTION PROTOCOL OUTLINE

A data collection protocol is an important document that clearly describes the many detailed procedures involved in your program's data collection activities. The protocol helps ensure that data collection is conducted consistently and accurately by all staff members throughout the duration of the program. It is a useful tool that is frequently referenced when questions arise about how to handle certain situations. You may wish to include this protocol in your program operations or policies and procedures manual. You will notice that some of the items included in the protocol overlap with information you may have in other program descriptions or documents. It is okay to simply cut and paste that information into this protocol—you do not have to rewrite it! It is important to have all the information consolidated here for comprehensive training during onboarding and for quick reference when data collection is ongoing.

Below is a suggested outline for a data collection protocol. The content within each section will be unique to your program. If your program already has an implementation plan drafted, much of the content for your protocol can be taken from the plan.

1) **Overview of Program Design (1–2 paragraphs)**
   a) Goals of the home visiting program (for example, "the program aims to reduce substance use and associated consequences for young mothers and their babies")
   b) Target families to be enrolled (for example, "expectant mothers ages 15–25")
   c) Number of people to be enrolled (for example, "50 participants over a two-year recruitment period")
   d) Methods for recruiting participants (for example, "through referrals from doctors and other service providers")
   e) Number and time period of visits (for example, "10 visits during pregnancy and 25 visits postpartum until the baby is two years old")
   f) Curriculum model to be used (for example, "the Families First Program")
   g) Data to be collected (for example, "data will be collected on maternal and child health at four timepoints during the two years of enrollment")

2) **Enrollment and Consent Procedures**
   a) Inclusion criteria (for example, "pregnant females, between 15–25 years old at time of enrollment, less than 32 weeks gestation, and lives within one hour driving distance of the local service unit")
   b) Exclusion criteria (for example, "currently participating in another early childhood home visiting program")
   c) Recruitment strategies (for example, "flyers, radio ads, website, in-services with service providers")
   d) Process for receiving referrals (for example, "service providers send referrals electronically to program team or leave paper referrals in a secure folder")
   e) Assigning participant ID numbers (describe the coding system and the point at which the ID number will be assigned)

f) Conducting informed consent (describe the process for conducting consents and properly obtaining signatures on forms)
g) Medical record release form (if applicable, describe the process for obtaining medical record release)
h) Next steps after consent (describe what happens after all enrollment forms are complete, such as the schedule and plans for the next visit)

3) <u>Procedures for Collecting Program Data</u>

a) Schedule for completing data collection visits (for example, include a table that lists all measures in the left column and all data collection timepoints in the top row, then check off which measures are collected at which timepoint)
b) "Window" for data collection visits (for example, if a visit is overdue, at what point should you skip that visit and move onto the next data collection timepoint)
c) Description of each data collection form (include a brief description of each measure and its purpose)
d) Instructions for completing each data collection form and scoring assessments

4) <u>Procedures for Managing Program Data</u>

a) Description of tracking log(s) and database(s) (include a brief description of any logs or databases used to manage data)
b) Procedures for creating and storing participant files or binders in the office (include a detailed description of how forms should be filed and where files should be stored)
c) Procedures for data entry into data systems, including persons responsible for entering data and checking data entry

5) <u>Additional Program Policies Related to Data Collection</u>

a) Confidentiality (explain the program's procedures to maintain participant confidentiality; for example, "all employees must sign a confidentiality statement")
b) Electronic communication with participants (for example, "staff will connect with participants via text, email, and Facebook"; if so, describe procedures to maintain confidentiality within this communication)
c) Incentive/reward procedures (for example, "gift cards will be given for data collection, and other rewards will be given during the program")
d) Electronic health record access (if program staff will access EHR, describe the relevant policies, such as what kinds of information they can and cannot look up in EHR)
e) Visits with participants who move out of the area (describe ways that these participants can still be contacted and involved in the program via mail, email, or phone)
f) Visits with participants who do not have contact with their baby and/or are not the primary caretaker (describe if/how these participants will still be involved in the program and if any data will be collected from them)
g) Procedures for emergency situations (for example, describe the process for handling participants who are in a mental health crisis or cases in which domestic violence or

child abuse is suspected; include key contact information for relevant community resources)

h) Enrolling relatives of staff members (describe the process for handling this situation; for example, “these participants will be served by a staff member who is not their relative”)
i) Completion of the program (describe the program’s definition of successful completion)
j) Dropping/withdrawing from the program (describe the procedures if participants say they do not want to be in the program anymore)

6) Staffing, Training, and Quality Assurance Procedures

a) Staff roles and responsibilities
b) Staff training components and procedures
c) Quality assurance procedures, such as direct assessments of home visitors, reconciliation of case files with data entry, and data quality checks

7) Reporting Procedures: ACF, Institutional Review Board (IRB), and Tribal Leadership

a) Staff roles and responsibilities
b) Data submission and review process
c) IRB approval process and reporting
d) Tribal leadership approval process and reporting
e) Adverse event reporting to the IRB

TOOL 2.4: DATA COLLECTION SCHEDULE TOOL
INSTRUCTIONS AND EXCEL FILE

This tool is an Excel template your program can use to create a data collection schedule. After you set up the tool for your program, it will calculate exact dates for when to collect data for each participant. You can use the tool to prepare and plan data collection activities, and supervisors can use it to make sure that data collection activities are taking place as planned. Instructions for using the tool are below.

INSTRUCTIONS FOR SETTING UP YOUR PROGRAM'S INDIVIDUALIZED DATA COLLECTION SCHEDULE TOOL

Welcome to your new Data Collection Schedule Tool! This tool will help you and your team document the various assessments and forms you use for collecting data and the timepoints at which you administer each of them. It will also help you track data collection activities for each family in the program, helping to ensure that data collection is taking place in a timely manner.

Many of the terms used in the instructions and workbook may be new to you if you are unfamiliar with Excel.

Still confused? Don't worry. Your TEI liaison can assist you with setting up your Data Collection Schedule Tool.

Description of Worksheets: First, let's review the worksheets in the Excel workbook. There are four sheets:

1. **Participant Log**
2. **Data Collection Schedule**
3. **Tool Names and Timepoints**
4. **CheatSheet for EDATE Formulas**

The **Participant Log** is where you will list information about each of your participating families in individual rows. This sheet gives you the "big picture" of your program and is used by the other sheets to look up information on individual families. Once you enter participant data, this sheet will automatically tell you if the mother enrolled prenatally or postpartum and the age of the child in months at enrollment.

☞ Initially, you will enter information on this sheet starting in Row 3 in columns A, B, C, and E. Columns D and F will automatically populate, so refrain from typing anything in these columns. Once your data collectors start using the tool, they will enter in the dates that the complete each tool for each participant in rows G on.

The **Data Collection Schedule** is your tool for looking at individual data collection activities by family. When you enter the Participant ID, fields in this sheet will automatically tell you which tools need to be collected and provide a goal date for completing each tool. Fields will also show you completion dates once the tools have been administered. The **Data Collection Schedule** can be an invaluable tool for home visitors and supervisors to keep track of upcoming data collection activities and monitor the completion of tools/forms.

You will need to set up formulas on this sheet down column B starting in Row 7. All other fields should be automatic.

The **Tool Names and Timepoints** sheet is where you will list all the tools you use for your program with each of the timepoints that the tool is used with families. Once you set this worksheet up, you will need to leave it alone so the rest of the Data Collection Schedule Tool can do its job (information you put into this worksheet is linked with other tabs to fill the cells).

You will need to enter information on this sheet down column A and B starting in Row 2.

The **CheatSheet for EDATE Formulas** is for reference only. You will not enter information on this sheet. The formulas provided on this sheet will help you set up the calculations for the **Data Collection Schedule**.

This entire sheet is for your reference only.

Step 1: Develop a Comprehensive List of Tools by Timepoint

You will need to gather some information about your program's data collection. Make a list of each of the tools you use to collect data from your participating families and each timepoint when you plan to administer each tool. You can do this on paper or directly into the **Tool Names and Timepoints** sheet.

Tool Name, Timepoint

Demographic Form, Enrollment
Demographic Form, Enrollment + 12 months
Infant Health Form, Delivery
Infant Health Form, Enrollment
EPDS, Delivery
EPDS, Delivery + 6 months
EPDS, Delivery + 12 months

- Include *all* tools used for *all* child and caregiver participants that you would like to track in this system.

- If you have a tool that can be administered at two different timepoints (for example, a tool administered at birth for families enrolled prenatally or at enrollment for families enrolled postpartum) list the tool twice, once with each potential timepoint. For example, see the Infant Health Form to the right.

- If you would like to track data collection that occurs by events as opposed to dates (for example, after a particular module of your curriculum), write a name for the data collection activity (for example, "Knowledge Test") and a description of the timepoint (for example, "After completion of Module 6").

- There is already an automatic trigger for data collection related to participants exiting the program, so you do not need to list that.

Modifying rows and columns: A word of caution

There likely will come a time when you will be tempted to cut, delete, remove, or insert an entire row or column in the workbook. *Don't do it!* This will cause problems for you in the automated cells.

INSTEAD, cut and paste only the content of individual cells or take the time to enter it by hand.

- You may have filled out a form called the **Data Collection Planning Table** during your program development. If you have, you can use that table to gather this information easily.

- It will be helpful down the line if you name the timepoint for each tool something informative such as "Enrollment + 6 months" instead of "Second Administration," because it provides helpful information in headers you will use later.

Step 2: Transfer the List of Tools by Timepoint to the Data Collection Schedule Tool

Now that you have developed a comprehensive list of tools and their administration timepoints, you will go to the **Tool Names and Timepoints** worksheet.

If you click on that sheet, you will see two columns, **Tool Name** and **Administration Timepoints**.

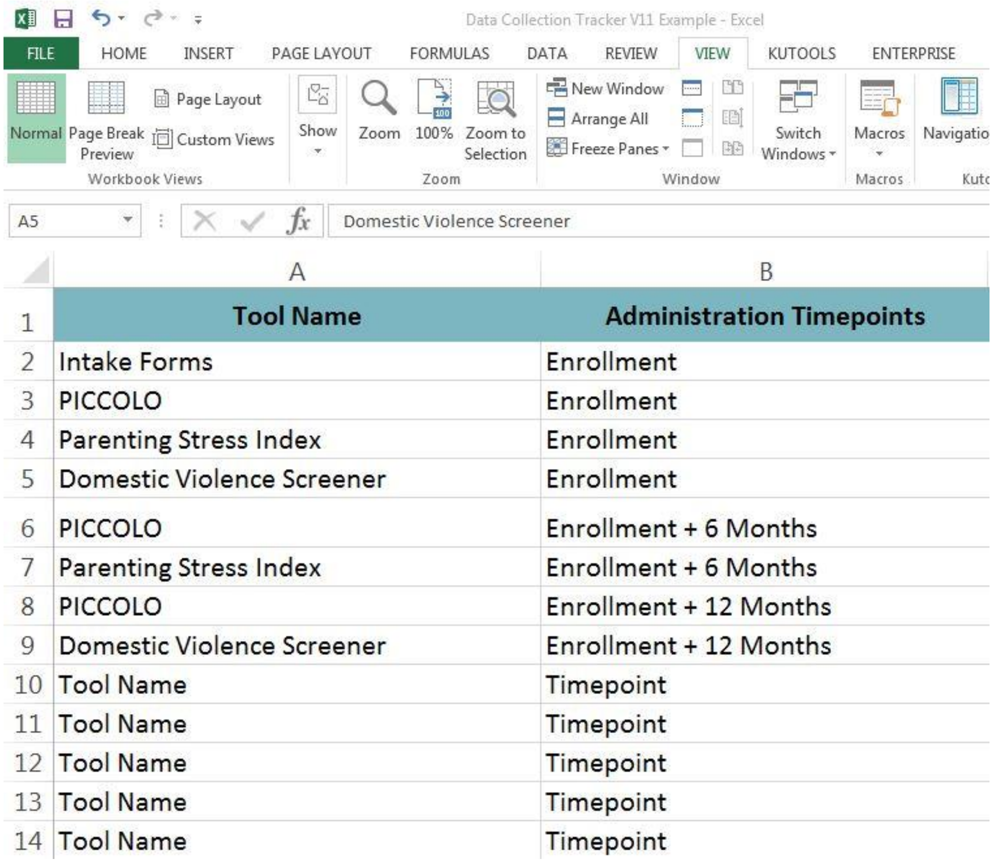
Want to see something cool?

What you type on this sheet will automatically populate in your **Participant Log** and **Data Collection Schedule.**

1. Begin entering each tool by its administration timepoints. Transfer the list you created from above onto the sheet by entering the name of the first tool over the Tool Name text in A2 and the Timepoint it will be administered in B2, and then the next tool name in A3 and timepoint in B3, and so on.

    - Do your best to list your tools chronologically, in the order in which they will be administered to each individual. For example, list all the tools you will administer at enrollment first and then delivery, 6 months, and so on. It will order things more clearly on your **Participant Log.**

2. Complete your cell entry and then double check to make sure every tool and timepoint is accounted for in these fields.



	A	B
1	**Tool Name**	**Administration Timepoints**
2	Intake Forms	Enrollment
3	PICCOLO	Enrollment
4	Parenting Stress Index	Enrollment
5	Domestic Violence Screener	Enrollment
6	PICCOLO	Enrollment + 6 Months
7	Parenting Stress Index	Enrollment + 6 Months
8	PICCOLO	Enrollment + 12 Months
9	Domestic Violence Screener	Enrollment + 12 Months
10	Tool Name	Timepoint
11	Tool Name	Timepoint
12	Tool Name	Timepoint
13	Tool Name	Timepoint
14	Tool Name	Timepoint

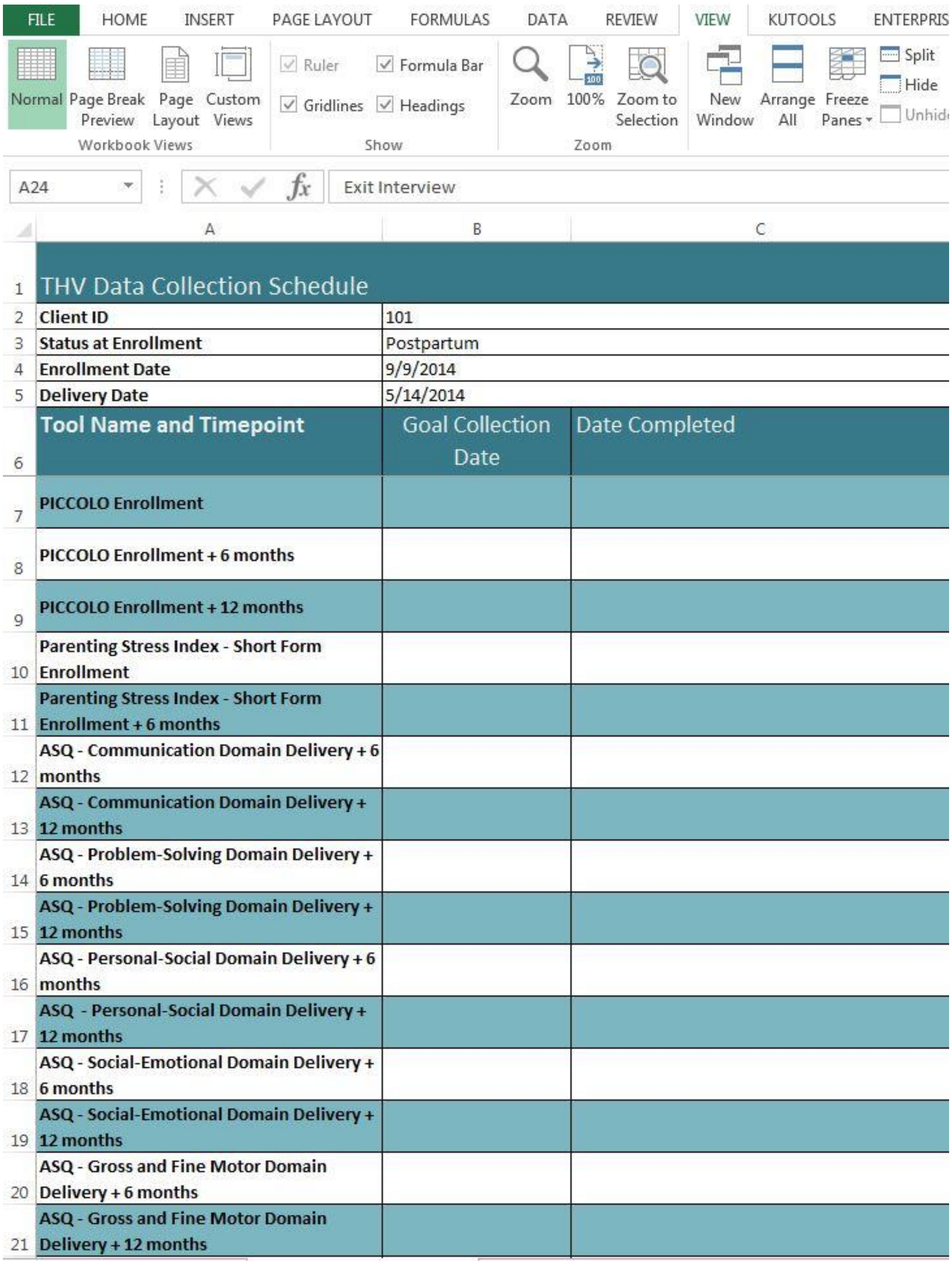
3. Once you have all this information entered correctly, forget about the **Tool Names and Timepoints** worksheet and don't look back. (The information you entered on this sheet will be used to create the Data Collection Schedule. If you change anything on this sheet, it will change your Data Collection Schedule).

Step 3: Establish Goal Dates for Timepoints

For the next step in setting up the tool, go to the **Data Collection Schedule** sheet. Before you see how amazing it can be, you have to do a little bit of work with the Goal Collection Date fields in Column B Row 7 and below.

Looking at the Data Collection Schedule sheet (see example below), you will see that Rows 2–5 are locked cells that are linked to individual participant information you will enter in your **Participant Log.**

You will also notice that your Tool Name and Timepoint should have automatically carried over from the **Tool Names and Timepoints** sheet into Column A Row 7 and below. *Hold on to any appreciation you have at this point for the autofill, because you might not like this next part….*



	A	B	C
1	THV Data Collection Schedule		
2	**Client ID**	101	
3	**Status at Enrollment**	Postpartum	
4	**Enrollment Date**	9/9/2014	
5	**Delivery Date**	5/14/2014	
6	**Tool Name and Timepoint**	Goal Collection Date	Date Completed
7	**PICCOLO Enrollment**		
8	**PICCOLO Enrollment + 6 months**		
9	**PICCOLO Enrollment + 12 months**		
10	**Parenting Stress Index - Short Form Enrollment**		
11	**Parenting Stress Index - Short Form Enrollment + 6 months**		
12	**ASQ - Communication Domain Delivery + 6 months**		
13	**ASQ - Communication Domain Delivery + 12 months**		
14	**ASQ - Problem-Solving Domain Delivery + 6 months**		
15	**ASQ - Problem-Solving Domain Delivery + 12 months**		
16	**ASQ - Personal-Social Domain Delivery + 6 months**		
17	**ASQ - Personal-Social Domain Delivery + 12 months**		
18	**ASQ - Social-Emotional Domain Delivery + 6 months**		
19	**ASQ - Social-Emotional Domain Delivery + 12 months**		
20	**ASQ - Gross and Fine Motor Domain Delivery + 6 months**		
21	**ASQ - Gross and Fine Motor Domain Delivery + 12 months**		

Column B Row 7 Tool Name Timepoint and below will hold your Goal Collection Date for each timepoint that each tool is to be administered (for example, demographic form enrollment, EPDS delivery + 2 months). You will now begin filling in the information that Excel will need to figure out the Goal Collection Date for each Tool by Timepoint. Each program has developed its own timepoints for data collection, so each program will need to fill in its individual program information here.

1. If your timepoint is either the Enrollment Date or Delivery Date, use a direct link formula to that specific cell in either B4 or B5, as shown below.

	A	B	C
1	**THV Data Collection Schedule**		
2	**Client ID**	101	
3	**Status at Enrollment**	Postpartum	
4	**Enrollment Date**	8/20/2014	
5	**Delivery Date**	5/14/2014	
6	**Current Status**	Active	
7	**Tool Name and Timepoint**	Goal Collection Date	Date Completed
8	**Intake Forms Enrollment**	=B4	
9	**PICCOLO Enrollment**		
10	**Parenting Stress Index Enrollment**		
11	**Domestic Violence Screener Enrollment**		
12	**PICCOLO Enrollment + 6 Months**		
13	**Parenting Stress Index Enrollment + 6 Months**		
14	**PICCOLO Enrollment + 12 Months**		
15	**Domestic Violence Screener Enrollment + 12 Months**		

It is likely that the rest of your timepoints are based on either Enrollment Date or Delivery Date in some way. Now you just have to tell Excel how to figure it out for each Tool by Timepoint.

Some of these formulas seem much more complicated than they are and can look pretty intimidating. To simplify this process, you have the **CheatSheet for EDATE Formulas**, which shows you the formulas that go with some of the more common timepoints used in our programs.

Common Timepoints	Fomulas To Type in the Formula Bar
Enrollment	=B4
Enrollment + 1 month	=IF(B4="","",EDATE(B4,1))
Enrollment + 6 months	=IF(B4="","",EDATE(B4,6))
Enrollment + 12 months	=IF(B4="","",EDATE(B4,12))
Enrollment + 24	=IF(B4="","",EDATE(B4,24))
Delivery	=B5
Delivery + 2 months	=IF(B5="","",EDATE(B5,2))
Delivery + 4 months	=IF(B5="","",EDATE(B5,4))
Delivery + 6 months	=IF(B5="","",EDATE(B5,6))
Delivery + 12 months	=IF(B5="","",EDATE(B5,12))
Delivery + 24 months	=IF(B5="","",EDATE(B5,24))
Delivery or Childs Age + 9 months	=IF(B5="","",EDATE(B5,9))
Childs Age 9 months + 3 months	=IF(B5="","",EDATE(B5,12))
Childs Age 9 months + 6 months	=IF(B5="","",EDATE(B5,15))
Childs Age 9 months + 12 months	=IF(B5="","",EDATE(B5,21))
Childs Age 9 months + 18 months	=IF(B5="","",EDATE(B5,27))
Intake Period	=IF(B4="","",EDATE(B4,1))

Quick tip: If you look at the formulas you will notice that they are all almost exactly the same. Formulas for timepoints based on enrollment will always use the B4 cell (example: '=IF(B4="","",EDATE(B4,1)). Formulas for timepoints on delivery date or child's age will always use the B5 cell '=IF(B5="","",EDATE(B5,1)). So, there are only two parts of your data collection date formula you will change, the text above in red and then the number of months: '=IF(B5="","",EDATE(B5,1)). I have put in a *holder formula* in all of the cells in your data collection schedule B7 down. Simply go in to B7 down and in each cell change the cell to either B4 (enrollment) or B5 (delivery) as indicated by the individual timepoint and then change the number of months from 1 to how many that indivdiual tool calls for. For example: for a tool adminstered 6 months after child is born, you would change the existing formula ('=IF(B4="","",EDATE(B4,1)) to '=IF(B5="","",EDATE(B5,6)).

2. To continue filling in the Goal Collection Date for each tool, open the **CheatSheet for EDATE Formulas** and identify the timepoint you need for your tool in Column A and the appropriate EDATE formula in Column B of the same row. For example, the EDATE formula for Enrollment + 6 months is =IF(B4="","",EDATE(B4,6)).

	A	B
1	Common Timepoints	Fomulas To Type in the Formula Bar
2	Enrollment	=B4
3	Enrollment + 6 months	=IF(B4="","",EDATE(B4,6))
4	Enrollment + 12 months	=IF(B4="","",EDATE(B4,12))
5	Enrollment + 24	=IF(B4="","",EDATE(B4,24))
6	Delivery	=B5
7	Delivery + 2 months	=IF(B5="","",EDATE(B5,2))
8	Delivery + 6 months	=IF(B5="","",EDATE(B5,6))
9	Delivery + 12 months	=IF(B5="","",EDATE(B5,12))
10	Delivery + 24 months	=IF(B5="","",EDATE(B5,24))
11	Delivery or Childs Age + 9 months	=IF(B5="","",EDATE(B5,9))
12	Childs Age 9 months + 3 months	=IF(B5="","",EDATE(B5,12))
13	Childs Age 9 months + 6 months	=IF(B5="","",EDATE(B5,15))
14	Childs Age 9 months + 12 months	=IF(B5="","",EDATE(B5,21))
15	Childs Age 9 months + 18 months	=IF(B5="","",EDATE(B5,27))

3. Select the column B cell with the appropriate formula for your tool (B3 from the example above), and the formula will appear in the formula bar at the top of the page. Select the text in the formula bar and copy it.

B5 '=IF(B4="","",EDATE(B4,6))

	A	B
1	**Common Timepoints**	**Fomulas To Type in the Formula Bar**
2	Enrollment	=B4
3	Enrollment + 1 month	=IF(B4="","",EDATE(B4,1))
4	Enrollment + 3 months	=IF(B4="","",EDATE(B4,3))
5	Enrollment + 6 months	=IF(B4="","",EDATE(B4,6))
6	Enrollment + 12 months	=IF(B4="","",EDATE(B4,12))
7	Enrollment + 24	=IF(B4="","",EDATE(B4,24))
8	Delivery	=B5
9	Delivery + 2 months	=IF(B5="","",EDATE(B5,2))
10	Delivery + 4 months	=IF(B5="","",EDATE(B5,4))
11	Delivery + 6 months	=IF(B5="","",EDATE(B5,6))
12	Delivery + 12 months	=IF(B5="","",EDATE(B5,12))
13	Delivery + 24 months	=IF(B5="","",EDATE(B5,24))
14	Delivery or Childs Age + 9 months	=IF(B5="","",EDATE(B5,9))
15	Childs Age 9 months + 3 months	=IF(B5="","",EDATE(B5,12))
16	Childs Age 9 months + 6 months	=IF(B5="","",EDATE(B5,15))
17	Childs Age 9 months + 12 months	=IF(B5="","",EDATE(B5,21))
18	Childs Age 9 months + 18 months	=IF(B5="","",EDATE(B5,27))
19	Intake Period	=IF(B4="","",EDATE(B4,1))

4. Select the **Data Collection Schedule** sheet and select the cell for the timepoint you are creating.

5. Paste the formula you have copied into the formula bar at the top of the page.

B13 '=IF(B4="","",EDATE(B4,6))

	A	B	C
1	**THV Data Collection Schedule**		
2	**Client ID**	101	
3	**Status at Enrollment**	Postpartum	
4	**Enrollment Date**	8/20/2014	
5	**Delivery Date**	5/14/2014	
6	**Current Status**	Active	
7	**Tool Name and Timepoint**	Goal Collection Date	Date Completed
8	**Intake Forms Enrollment**	=B4	
9	**PICCOLO Enrollment**		
10	**Parenting Stress Index Enrollment**		
11	**Domestic Violence Screener Enrollment**		
12	**PICCOLO Enrollment + 6 Months**		
13	**Parenting Stress Index Enrollment + 6 Months**	","",EDATE(B4,6))	
14	**PICCOLO Enrollment + 12 Months**		
15	**Domestic Violence Screener Enrollment + 12 Months**		

6. Finally, remove the apostrophe that appears at the beginning of the formula.

B13 '=IF(B4="","",EDATE(B4,6))

	A	B	C
1	**THV Data Collection Schedule**		
2	**Client ID**	101	
3	**Status at Enrollment**	Postpartum	
4	**Enrollment Date**	8/20/2014	
5	**Delivery Date**	5/14/2014	
6	**Current Status**	Active	
7	**Tool Name and Timepoint**	Goal Collection Date	Date Completed

7. Once you remove the apostrophe, the formula should change to a date.

8. Repeat this process, entering the appropriate formula in each Goal Collection Date cell.

    - You may get an error saying "#N/A" in a Date Completed cell until you enter data into your **Participant Log**.

    - At the top of the **Data Collection Schedule,** you will see the individual family's current status, which will automatically populate from the **Participant Log**. When the participant exits the program, this field will turn red to indicate that any exit tools need to be administered.

9. After you have provided a Goal Collection Date for each Tool Name and Timepoint, check your formulas and give yourself a pat on the back.

10. You have finished setting up your Data Collection Schedule Tool. *Congratulations!!*
    - At this point, you can lock the cells that contain your formulas so they cannot be changed or edited by accident. It is a good idea to lock the cells in the sheets you want to stay protected, especially if multiple people will be using the workbook. To lock the cells, select them, click Alignment, click Protection, and make sure "Locked" is selected. Then use the file tab to Protect the Workbook.

Interested in learning more?

Writing EDATE formulas is not as hard as it looks. In the formula bar, typing *=EDATE(B4,6)* will add 6 months to the date in cell B4 and generate the new date in the selected cell.

Also, if you want to learn about any of the formulas in this Excel spreadsheet or any other one, click the Formulas tab, click Show Formulas, and view the formulas the spreadsheet developer has used. It's a great way to learn.

Step 4: Use the Data Collection Schedule Tool

Now the exciting part starts as you move on to filling in the **Participant Log** sheet. This is the sheet where you will enter information by family for all your enrollees. You will use this sheet as well as the **Data Collection Schedule** throughout your program implementation.

	A	B	C	D	E	F	G
1	Client Log						
2	Client ID	Enrollment Date	Delivery/Due Date	Status at Enrollment	Current Status	Age of Child in months at Enrollment	Intake Forms Enrollment
3	101	9/20/2015	5/14/2015	Postpartum	Active	4	8/20/2015
4	102	11/9/2015	12/2/2015	Prenatal	Active	0	

1. Starting in Column A Row 3, you will list the ID you have given the individual family. This can be a numerical or text value. Notice that this tracks instruments by family and not by individual, so you do not enter an ID for a mother and a child separately.

2. As you move through Row 3, you will fill in the cells moving to the right and enter the information for that specific family. Each column header (above in light green) will ask you for a different bit of information for that family.

   - For example, in B3 (Enrollment Date), you will enter the date the family with the ID in A3 enrolled in the program (Row 3 is filled out as an example to follow).

3. For Column C, you can enter a due date or a delivery date. If you enter a due date, you will need to change this date once the baby is born to the delivery date. Note: If you do not wish to provide a due date and instead leave the field in Column C blank, you will have a temporary miscalculation for Column D and E until you provide an actual delivery date.

4. You will notice that the fields in Column D and F will autofill with the appropriate information. Column D will tell you whether the family enrolled during the prenatal or postpartum period for the index child whose delivery date is provided in the C column. Column F will automatically calculate the age in months of baby at enrollment, indicating "0" if mother enrolled prenatally.

5. For Column E, you will select the appropriate status for the family using the drop-down. Note: If you change a family from Active to any of the other options, an exit interview will become due for that family on the **Data Collection Schedule.**

6. You might also notice that the headers for Columns F through V will match the Tool Name and Administration Timepoints from the information you entered in the **Tool Names and Timepoints** worksheet. *It's working!*

7. As your home visitor continues with data collection, she will provide the dates on which each Tool by Timepoint was administered for each family in Columns F and beyond. This Completion Date will automatically populate on the **Data Collection Schedule** for each individual family.

Once you have entered information for a few families in columns A through C, you now get to see the exceedingly useful functionality of the **Data Collection Schedule** sheet.

1. Click on the **Data Collection Schedule** sheet.

2. Use the drop-down box in Row 2 to the right of Participant ID and select an ID.

3. Watch as the dates change based on that family's particular Enrollment and Delivery date.

4. Notice that any dates in the Goal Collection Date column that are due within a month will change to RED indicating that they are due (see example below). To provide a heads-up, the cell will turn YELLOW for the month prior to the due date. The colors will not change automatically in the due date until the next month, but you will be able to

see that the tool has been administered once a completion date has been provided on the **Participant Log.**

5. The Data Collection Schedule Tool is now ready to use!

Below is an example of what your **Data Collection Schedule** sheet will look like once you have it ready to go. You will be able to see the Goal Collection Date and Date Completed for each tool for each of your families in real time. Also, this screen can be printed and included in hard copy files or given to the family to show the data collection timepoints.

	A	B	C
1	**THV Data Collection Schedule**		
2	**Client ID**	101	
3	**Status at Enrollment**	Postpartum	
4	**Enrollment Date**	9/20/2015	
5	**Delivery Date**	5/14/2015	
6	**Current Status**	Active	
7	**Tool Name and Timepoint**	Goal Collection Date	Date Completed
8	**Intake Forms Enrollment**	9/20/2015	8/20/2015
9	**PICCOLO Enrollment**	9/20/2015	8/22/2015
10	**Parenting Stress Index Enrollment**	9/20/2015	8/20/2015
11	**Domestic Violence Screener Enrollment**	9/20/2015	8/22/2015
12	**PICCOLO Enrollment + 6 Months**	3/20/2016	
13	**Parenting Stress Index Enrollment + 6 Months**	3/20/2016	
14	**PICCOLO Enrollment + 12 Months**	9/20/2016	
15	**Domestic Violence Screener Enrollment + 12 Months**	9/20/2016	

TOOL 2.5: DATA ELEMENT TRACKING FORM

This tool is designed to keep track of where each data element is addressed within the overall program data collection plan. No data will be recorded on this sheet; it is simply a map for program staff to use to locate the data elements within specific questions and forms in their data plan. Filling out this form during the planning stage helps to ensure that all required data elements are addressed. The form also can identify where data can be found once they are collected, which can help staff gather data during the reporting phase.

Instructions for Use:

1. Column 1: Identify a specific data element.
2. Column 2: Indicate which form collects the data for that element.
3. Column 3: Identify the exact question from which the data can be extracted.
4. Column 4: Identify where in your program's data system the response to the question is recorded.
5. Column 5: Indicate the timepoints for data collection of that element.
6. Column 6: Record notes or special instructions.

If your funding requires that you fill out Home Visiting Form 1, you might consider using the data elements directly from that form to facilitate the reporting of demographic information and service utilization. You could also use the tool provided here to plan for Tribal MIECHV benchmark data collection by including each benchmark as a data element. Otherwise, the form can be used to keep track of any data your program needs to collect. Simply insert as many rows as you need to accommodate the needs of your program.

Data Element Tracking Form

Data Element	Form(s) Used To Collect the Data	Question	Location of the Data in the System	When Data Are Collected	Notes
EXAMPLE: *Age of enrollee*	*Demographic intake form*	*Question 3: Date of birth*	*Dem Form 1: Q3*	*At intake only*	*Information generated by a formula based on date of birth and data or enrollment.*

TOOL 2.6: SAMPLE TRAINING SCHEDULE

Below is a sample checklist to monitor staff orientation and training activities throughout the training period. It can be adapted to include an organization's specific orientation and training procedures.

Task	Date Completed	Employee Initials
Organization orientation • Receive an introduction to the program staff and work space • Discuss with supervisor or human resources issues such as organization background and structure, program background and structure, administrative policies, time keeping, benefits, and confidentiality		
Required privacy and security trainings (e.g., training in the Health Insurance Portability and Accountability Act [HIPAA] and human subjects protection)		
Policies and procedures manual and quiz • Read manual independently • Review each section of the manual with supervisor or other staff • Take quiz		
Data collection protocol • Participate in an introduction to program data collection (*Trainings included in toolkit*) • Review the data collection protocol		
Informed consent process • Explain rules for obtaining consent from minors and non-minors • Review the consent form(s) • Role play with other staff and supervisor • Observe at least two consents done by other staff • Complete consent certification		
Recruitment procedures • Explain inclusion and exclusion criteria • Explain the referral process • Explain the purpose of in-services • Review referral form(s) • Review current recruitment strategies at the site • Explain approaches for contacting minors vs. non-minors		
File management • Review the location and contents of binders, charts, and folders		

Task	Date Completed	Employee Initials
Data collection forms • Explain the difference between self-reports, structured interviews, and observational assessments • Explain the data collection schedule • Explain how each measure is administered (electronically vs. on paper) • Review all data collection forms independently • Role play the structured interviews and observational assessments with other staff and supervisor		
Computer logs and files • Review the tracking log • Practice using the scheduling tool • Explain file management on the computer and where electronic files are saved		
Incentives/rewards • Explain procedures for distributing and documenting gift cards • Explain procedures for distributing other rewards		
Additional training • External curriculum training/certification • External trainings on data collection tools • External trainings on maternal and child health promotion		