FAMILY SERVICES - RETENTION & ENGAGEMENT METRICS

Parenting & Family Strengthening
Objectives

- Inform
- Understand
- Navigate
- Support
Family Services Initiatives

Parenting

Family Strengthening
# Program Metrics

<table>
<thead>
<tr>
<th>Program Participation</th>
<th>Service utilization: Services offered are being utilized by participants</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Engagement: Average participant attendance is in line with expected attendance</td>
</tr>
<tr>
<td></td>
<td>Retention: Contracted number of participants are receiving contracted number of sessions</td>
</tr>
</tbody>
</table>

## Engagement

**Average participant attendance is in line with expected attendance**

Applicable to: All programs that implement attendance-based activities.

Review time: Item will be reviewed throughout the contract year.

Calculation:

\[
\text{Average of days/sessions/hours attended by all participants} \div \text{Average of contracted days/sessions/hours participants were expected to attend}
\]

## Retention

**Contracted Number of Participants are Receiving Contracted Number of Sessions**

Applicable to: Programs that implement attendance-based activities (except K-5 school-year and summer programs).

Review time: For rolling enrollment programs, item will be reviewed throughout the contract year; for year-round programs, item will be reviewed during months eight and twelve.

Calculation:

\[
\text{Total participants/families meeting the expected number of sessions/hours} \div \text{Total participants/families contracted to be served}
\]
New Data Access

- Providers will now have access to grids at the **contract**, **activity** and **participant level**.

- Access these grids in Trust Central > Metrics Module> “Data” tab.

- A guide is available to help you understand which grids are available including a brief description of what data you now have access to.
Share Out

• Share this video with team members that:
  • Use data to make programmatic decisions (i.e.: Program directors, program managers and coordinators)
  • Enter data and complete data quality checks
  • Anyone from the team that will benefit understanding the program participation component!
WHY DO WE MEASURE THEM?

Recruitment - % of participants/families with attendance

Retention - % of participants/families with expected sessions

Engagement - % of average sessions relative to the expected
WHAT DATA IS REFERENCED?

**Numerator:**
- SAMIS Attendance

**Denominator:**
- Scope sections
  - Activities
  - Participants
  - EBP
WHAT’S NOT PART OF CALCULATION?

- **Contracts:**
  - Parent Club
  - Healthy Steps programs

- **Activities:**
  - activities with only 1 required session
  - demographics only
WHEN ARE THE METRICS REVIEWED?

Calculation is ongoing but rated per Metrics Tool timeline:

Retention
• rolling enrollment programs: throughout the contract year
• year-round and cohort programs: during months eight and twelve.

Engagement
• throughout the contract year
<table>
<thead>
<tr>
<th>Dimension</th>
<th>Retention*</th>
<th>Engagement*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>Retention*</td>
<td>Engagement*</td>
</tr>
<tr>
<td>Activity</td>
<td>Engagement</td>
<td></td>
</tr>
<tr>
<td>Participant-Activity</td>
<td>Retention</td>
<td></td>
</tr>
</tbody>
</table>
**HOW IS RETENTION CALCULATED?**

| Contract | Retention*  | % of contracted retained=
# of families or participants retained out of the contracted |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant-Activity</td>
<td>Retention</td>
<td>If # of sessions attended =&gt; expected Then participant retained</td>
</tr>
</tbody>
</table>
UNDERSTANDING PARTICIPANT-ACTIVITY DIMENSION
Was the participant retained in the activity?

1. Does the activity have a subsequent activity?
2. Is the activity mutually exclusive?
3. How many active months does participant have?
4. How many monthly sessions are expected for the activity? Is the activity cohort or year-round and therefore have a max sessions?
5. Based on this, how many sessions are expected?
6. How many sessions were attended in the activity?
7. Are the number of sessions attended greater than or equal to sessions expected?
Subsequent Activities

**Definition**

It’s a system calculation to help calculate the time/months in program/activity when participants attended multiple activities during the contract year.

**Classification**

Is the activity with the latest date of attendance in the year.

If latest date of attendance is the same for two activities, then the activity with the later start date of attendance would be treated as subsequent.

**Subsequent**

First day of attendance to last episode completion date or selected end date (whichever is first)

**Non-Subsequent**

First to latest day of attendance in activity
## Example of Subsequent Activities

- **A** (Aug 1): First day of attendance to latest episode completion date or through date.
- **B** (Aug 15): First day of attendance to last day of attendance.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Calculation</th>
<th>Schedule Type</th>
<th>Active Months (C)</th>
<th>Monthly Required Sessions (D)</th>
<th>Sessions Expected (E)=C x D</th>
<th>Actual Units Service (F)</th>
<th>Retained Y/N F=&gt;E</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>First day of attendance to latest episode completion date or through date</td>
<td>Rolling enrollment Subsequent</td>
<td>12</td>
<td>3</td>
<td>36</td>
<td>9</td>
<td>No</td>
</tr>
<tr>
<td>B</td>
<td>First day of attendance to last day of attendance</td>
<td>Rolling enrollment Non subsequent</td>
<td>1.5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Mutually Exclusive

**DEFINITION**

Activities with the same grouping but with different timing.

**IMPORTANT NOTES**

Participants cannot attend mutually exclusive activities during the same time period.

The calculation only accounts for moving back and forth between activities once.

**ACTIVITY NAMES**

Home Visits
Family Counseling
Psychoeducation
Behavioral/Mental Health Education

**Examples**

Home Visits – Monthly
Home Visits – 2x Per Month
## Example of Mutually Exclusive Activities

**Attendance dates:**

- Nov 1
- Dec 1
- Jan 1
- Feb 1
- Mar 1
- Mar 15
- Apr 1
- Apr 15
- May 1
- May 15
- Jun 1
- July 1
- Aug 1

**Home Visits Monthly**

- Home Visits 2x Per Month

**Home Visits 2x Per Month**

- Home Visits Monthly

**Completion Date:** Also Aug 1

### Accounting for Mutually Exclusive Activities:

<table>
<thead>
<tr>
<th>Activity</th>
<th>First Date Attendance</th>
<th>Last Date Attendance</th>
<th>Active Months</th>
<th>Active Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Visits Monthly</td>
<td>Nov 1</td>
<td>Feb 1</td>
<td>3</td>
<td>3 + 2 = 5</td>
</tr>
<tr>
<td>Home Visits 2x Per Month</td>
<td>Jun 1</td>
<td>Aug 1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Home Visits 2x Per Month</td>
<td>Mar 1</td>
<td>May 15</td>
<td>2.5</td>
<td>2.5</td>
</tr>
</tbody>
</table>
PARTICIPANT METRICS CALCULATIONS AND CONTRACT EXPECTATIONS
Scope of Services – EBP/Curricula

**Rolling Enrollment**

<table>
<thead>
<tr>
<th>EBP Curriculum</th>
<th>Program Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nurturing Parenting Program (NPP) for parents of infant, toddlers, and preschoolers (home visiting)</td>
<td>Individual Parenting Services (Home Visiting)</td>
</tr>
<tr>
<td><strong>Basis for Recruitment:</strong> Participants</td>
<td></td>
</tr>
<tr>
<td><strong>Basis for Retention:</strong> Monthly Required Sessions</td>
<td></td>
</tr>
</tbody>
</table>

**Cohort or Year Round**

<table>
<thead>
<tr>
<th>EBP Curriculum</th>
<th>Program Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nurturing Parenting Program (NPP) for parents of school age children ages 5-11 years (workshops)</td>
<td>Group Parenting Education</td>
</tr>
<tr>
<td><strong>Basis for Recruitment:</strong> Participants</td>
<td></td>
</tr>
<tr>
<td><strong>Basis for Retention:</strong> Total Required Sessions</td>
<td></td>
</tr>
</tbody>
</table>
Scope of Services – Activities Section

EBP Curriculum: Nurturing Parenting Program (NPP) for parents of infants, toddlers, and preschoolers (home visiting)

Required or Optional: Required

Activity Name: Home Visits - Weekly

Home visit activities are delivered by family coaches, social workers, and nurses on a weekly basis to promote maternal and child health, support child development, parenting skills, and positive family relationships. Home Visitors help parents realize their role as their children’s first and most important teacher, generating enthusiasm for learning and verbal interaction through the use of engaging books and stimulating toys. The home visits help families challenged by poverty, limited education, language, and literacy barriers, and other obstacles to achieve school success by preparing their children to enter school ready to be in the classroom.

Approaches to Implementation:
Home visits use the highly-structured, evidence-based, strength-based, Nurturing Parenting Program curriculum and includes experiential activities and parent homework. Sessions are offered in English and Spanish. Family Nurturing Time is a mid-session break time within the sessions when parents, children, and the Nurturing Coach come together to practice new skills through games, songs, and dance. Each session consists of approximately two lessons. Make-up sessions will also be provided when necessary and will be conducted by scheduling additional weekly session. The nurturing activity will only be conducted once to cover both sessions and all lessons since closely related sessions will be conducted together to provide the maximum effect and understanding for participants.

Sessions Expected

Monthly Required Sessions

<table>
<thead>
<tr>
<th>Total Required Sessions: 19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Required Sessions: 3</td>
</tr>
</tbody>
</table>

Frequency: 1 time(s) per week
Intensity: 150 minutes
Duration: 12 Months
Sessions Offered: 24
Families: 80
Parents: 85
Children: 80
### Sessions Expected Rolling Enrollment Programs

#### Activity Calculation Schedule Type Active Months (C) Monthly Required Sessions (D) Sessions Expected \((E) = C \times D\) Actual Units Service (F) Retained Y/N F=>E

<table>
<thead>
<tr>
<th>Activity</th>
<th>Calculation</th>
<th>Schedule Type</th>
<th>Active Months (C)</th>
<th>Monthly Required Sessions (D)</th>
<th>Sessions Expected ((E) = C \times D)</th>
<th>Actual Units Service (F)</th>
<th>Retained Y/N F=&gt;E</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>First day of attendance to last day of attendance</td>
<td>Rolling enrollment</td>
<td>4</td>
<td>3</td>
<td>12</td>
<td>9</td>
<td>No</td>
</tr>
<tr>
<td>B</td>
<td>First day of attendance to latest episode completion date or through date</td>
<td>Rolling enrollment</td>
<td>6.5</td>
<td>1.6</td>
<td>10</td>
<td>10</td>
<td>Yes</td>
</tr>
</tbody>
</table>

*Sessions expected round down*
# Sessions Expected
## Cohort and Year-round

<table>
<thead>
<tr>
<th>Activity</th>
<th>Calculation</th>
<th>Schedule Type</th>
<th>Active Months (C)</th>
<th>Monthly Required Sessions (D)</th>
<th>Sessions Expected (E) = C x D</th>
<th>Actual Units Service (F)</th>
<th>Retained Y/N F=&gt;E</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>First day of attendance to latest episode completion date or through date</td>
<td>Cohort</td>
<td>4</td>
<td>3</td>
<td>10*</td>
<td>9</td>
<td>No</td>
</tr>
<tr>
<td>B</td>
<td>First day of attendance to latest episode completion date or through date</td>
<td>Cohort</td>
<td>6.5</td>
<td>1.6</td>
<td>10*</td>
<td>10</td>
<td>Yes</td>
</tr>
</tbody>
</table>

*If schedule type is cohort or year-round, then sessions expected cannot exceed required sessions.

**Latest Episode Completion Date**

- **A**: Aug 1 to Dec 1
- **B**: Feb 15

*Capped at 10 due to the required # of sessions*
### Sessions Expected
**Mixed Cohort and Rolling Enrollment**

*If schedule type is cohort or year-round, then sessions expected cannot exceed required sessions*

<table>
<thead>
<tr>
<th>Activity</th>
<th>Calculation</th>
<th>Schedule Type</th>
<th>Active Months (C)</th>
<th>Monthly Required Sessions (D)</th>
<th>Sessions Expected (E)=C x D</th>
<th>Actual Units Service (F)</th>
<th>Retained Y/N F=&gt;E</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>First day of attendance to latest episode completion date or through date</td>
<td>Rolling enrollment Subsequent</td>
<td>6.5</td>
<td>3</td>
<td>19</td>
<td>9</td>
<td>No</td>
</tr>
<tr>
<td>B</td>
<td>First day of attendance to latest episode completion date or through date</td>
<td>Cohort</td>
<td>6.5</td>
<td>1.6</td>
<td>6*</td>
<td>6</td>
<td>Yes</td>
</tr>
<tr>
<td>C</td>
<td>First day of attendance to last day of attendance</td>
<td>Rolling enrollment Non subsequent</td>
<td>1.5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Capped at 6 due to the required # of sessions. Actual Calculation would have been 10.4
<table>
<thead>
<tr>
<th>Activity</th>
<th>Participant Last Name</th>
<th>Active Months</th>
<th>Actual Units of Service</th>
<th>Actual Days</th>
<th>Retention Participant</th>
<th>Retention Family</th>
<th>Participant Met Requirements</th>
<th>Total Sessions Exp.</th>
<th>Total Sessions Att.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARENTING CONSULTATION</td>
<td>Acevedo</td>
<td>3.2</td>
<td>9.00</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>PARENTING CONSULTATION</td>
<td>Acevedo</td>
<td>3.2</td>
<td>9.00</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>PARENTING CONSULTATION</td>
<td>Gonzalez</td>
<td>2.3</td>
<td>5.00</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>No</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>PARENTING CONSULTATION</td>
<td>Perez</td>
<td>3.3</td>
<td>3.00</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>No</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>PARENTING CONSULTATION</td>
<td>Diaz</td>
<td>2.3</td>
<td>5.00</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>No</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>PARENTING CONSULTATION</td>
<td>Jimenez</td>
<td>3.2</td>
<td>9.00</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>Yes</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>
CONTRACT RETENTION
BASIS FOR UTILIZATION (BOU):

Criteria for program retention:

Participants: meet if retained for all activities

Families: meet if at least one participant retained for all activities
Contract Retention

- Basis for Utilization (BOU)- Participants:
  - 100 participants recruited
  - 60 participants retained across all activities.
  - 70 participants contracted

What is contract retention %?

\[
\frac{60 \text{ retained}}{70 \text{ contracted}} = 86\%
\]
BOU Families:
- 100 families recruited
- 50 families with at least 1 participant in family retained for all activities.
- 75 families contracted

What is contract retention %?

\[
\frac{50 \text{ retained}}{75 \text{ contracted}} = 67\% 
\]
CONTRACT METRICS GRID
Notes for Parenting and Family Strengthening programs

• Activities with zero days of attendance in the year are excluded from the calculations even if it was expected they be included based on the contract.

• The “Activities Included in Calc” field for each activity is the indicator to determine if the activity was accounted or not. The possible options are “Yes”, “No” OR “No, zero attendance.”

• Activities that were excluded from the contract calculation would say “No” OR “No, zero attendance.”

• Family Strengthening first year 17-18 is not calculated for because they did not use the template in the first year of the cycle.
**HOW IS ENGAGEMENT CALCULATED?**

<table>
<thead>
<tr>
<th>Contract</th>
<th>Engagement*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average Activity Engagement %</td>
</tr>
<tr>
<td>Activity</td>
<td>Engagement</td>
</tr>
<tr>
<td></td>
<td>Average # sessions attended divided by Average # of sessions expected = Activity Engagement %</td>
</tr>
</tbody>
</table>
HOW IS ENGAGEMENT CALCULATED?

EXAMPLE:
My Sunny Agency- The Incredible Years program has two activities:

- Parenting Workshops-School-Age: average 5 sessions attended and 5 expected
- Parenting Workshops-Toddlers: average 8 sessions attended and 12 expected

What is the contract engagement percentage?

$\frac{5}{5}=100\%$

$\frac{8}{12}=66\%$

$100+66=166/2=83\%$

*if an activity has greater than 100% engagement at the activity level, it is capped at 100% before being rolled up to the contract level*
LET’S TRY IT!

WHAT DO YOU NEED
- Calculator
- Paper
- Pencil/Pen

EXAMPLE
My Sunny Agency-The Incredible Years program has two activities:

- Parenting Workshops-School-Age: average 4 sessions attended and 6 expected
- Parenting Workshops-Toddlers: average 7 sessions attended and 10 expected

CALCULATION:
What is the contract engagement percentage?

\[
\frac{4}{6} = 67\%
\]
\[
\frac{7}{10} = 70\%
\]
\[
\frac{67 + 70}{2} = \frac{137}{2} = 68.5\%
\]

*if an activity has greater than 100% engagement at the activity level, it is capped at 100% before being rolled up to the contract level
ACTIVITY METRICS GRID
<table>
<thead>
<tr>
<th>EBP Curriculum</th>
<th>Activity</th>
<th>Activity Included (Weekly)</th>
<th>Date Attendance</th>
<th>Time Passed</th>
<th>Retained Families</th>
<th>Retained Participants</th>
<th>Average Expected Sessions</th>
<th>Average Actual Sessions</th>
<th>Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Instruction for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>10/7/2020</td>
<td>100.00%</td>
<td>108</td>
<td>108</td>
<td>25.5</td>
<td>27</td>
<td>105.90%</td>
</tr>
<tr>
<td>Home Instruction for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>7/31/2019</td>
<td>100.00%</td>
<td>14</td>
<td>14</td>
<td>24.6</td>
<td>23</td>
<td>90.70%</td>
</tr>
<tr>
<td>Home Instruction for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>10/30/2020</td>
<td>100.00%</td>
<td>19</td>
<td>19</td>
<td>23.6</td>
<td>25</td>
<td>105.40%</td>
</tr>
<tr>
<td>Home Instruction for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>1/7/2020</td>
<td>100.00%</td>
<td>124</td>
<td>124</td>
<td>23.3</td>
<td>24</td>
<td>106.10%</td>
</tr>
<tr>
<td>Home Instruction for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>11/6/2019</td>
<td>100.00%</td>
<td>35</td>
<td>35</td>
<td>22.8</td>
<td>23</td>
<td>82.90%</td>
</tr>
<tr>
<td>Nurturing Parenting for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>8/17/2020</td>
<td>100.00%</td>
<td>82</td>
<td>82</td>
<td>22.8</td>
<td>189</td>
<td>73.30%</td>
</tr>
<tr>
<td>Nurturing Parenting for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>9/5/2019</td>
<td>100.00%</td>
<td>22</td>
<td>22</td>
<td>22</td>
<td>189</td>
<td>101.00%</td>
</tr>
<tr>
<td>Nurturing Parenting for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>8/4/2020</td>
<td>100.00%</td>
<td>20.4</td>
<td>20.4</td>
<td>20.4</td>
<td>185</td>
<td>90.70%</td>
</tr>
<tr>
<td>Nurturing Parenting for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>3/14/2020</td>
<td>100.00%</td>
<td>19.7</td>
<td>19.7</td>
<td>20.2</td>
<td>20.3</td>
<td>100.50%</td>
</tr>
<tr>
<td>Nurturing Parenting for Parents as Teachers</td>
<td>Home Visits - Weekly</td>
<td>Yes</td>
<td>8/31/2020</td>
<td>100.00%</td>
<td>12.2</td>
<td>12.2</td>
<td>12.2</td>
<td>62.00%</td>
<td>62.00%</td>
</tr>
</tbody>
</table>
TRUST CENTRAL GRID DEMO
Resources and Support

- Power Point from this presentation (website)
- Retention & Engagement Metric Video (website)
- Program Participation One-pager (website)
- Metrics Module- Data Grids Guide (website)
- Grids in Trust Central
- Support from your Program Manager
- Open labs*
Open Labs

Pre-requisite: Watch this video

Interactive session based on question from group

Registration will require specific question provider has
Explore the Metrics/Data grids

- Data at different levels
- Helps you better understand program performance
- Definitions of all the fields
Reach out to your program manager

Attend open lab - Registration will be provided via email from Program manager