

FAMILY SERVICES- RETENTION & ENGAGEMENT METRICS

Parenting & Family Strengthening



Objectives



Inform



Understand



Navigate




Support

Family Services Initiatives

Parenting

Family
Strengthening

Program Metrics

	Program Participation	Service utilization: Services offered are being utilized by participants
		Engagement: Average participant attendance is in line with expected attendance
		Retention: Contracted number of participants are receiving contracted number of sessions

Engagement	<p>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:</p> $\frac{\text{Average of days/sessions/hours attended by all participants}}{\text{Average of contracted days/sessions/hours participants were expected to attend}}$
Retention	<p>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:</p> $\frac{\text{Total participants/families meeting the expected number of sessions/hours}}{\text{Total participants/families contracted to be served}}$

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.



Guide Available on our website !

Metrics Module-Data Grids

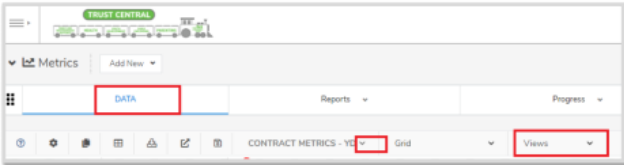
The Metrics Module is where you will find program performance information – how your program is performing. In this module, you will find the data needed to support your continuous quality improvement efforts.

The “Data” tab holds a variety of grids for the Youth Development and Family Services initiatives. This data is calculated from participant data entered in SAI IS Programmatic. It is important the data is reviewed continuously to assess program performance and data quality.

For more information on the Metrics Module [Click Here](#).

Accessing the Grids

- Go to the Metrics Module- Data Tab
- Drop down of different grids are available by clicking on the drop-down arrow.



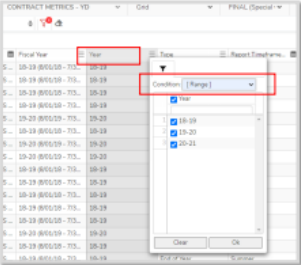
*To access the initiative-specific view in the Contract Metrics-YD grid described below click on “Views”

Please note: You can filter for different program years within a grid. To do so, go to the “Year” field and click on the icon.


Select conditions- “Contains” or “Range” and select the year. Defaults are set to the current program year.

Years included:

- 18-19
- 19-20
- 20-21



Rev:11/04/2020



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

WHICH DIMENSIONS ARE CALCULATED?

Contract	Retention* Engagement*
Activity	Engagement
Participant-Activity	Retention

HOW IS RETENTION CALCULATED?

Contract	Retention* % of contracted retained= # of families or participants retained out of the contracted
Participant-Activity	Retention If # of sessions attended => expected Then participant retained

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

Calculation

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



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

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	Home Visits Monthly
Dec 1	
Jan 1	
Feb 1	
Mar 1	Home Visits 2x Per Month
Mar 15	
Apr 1	
Apr 15	
May 1	Home Visits Monthly
May 15	
Jun 1	
July 1	
Aug 1	

Accounting for Mutually Exclusive Activities:

Activity	First Date Attendance	Last Date Attendance	Active Months	Active Months
Home Visits Monthly	Nov 1	Feb 1	3	3 + 2 = 5
	Jun 1	Aug 1	2	
Home Visits 2x per Month	Mar 1	May 15	2.5	2.5

Completion Date
Also Aug 1

**PARTICIPANT
METRICS
CALCULATIONS
AND CONTRACT
EXPECTATIONS**

Scope of Services – EBP/Curricula

Rolling Enrollment

EBP Curriculum	Program Type
Nurturing Parenting Program (NPP)/ for parents of infant, toddlers, and preschoolers (home visiting)	Individual Parenting Services (Home Visiting) Basis for Recruitment: Participants Basis for Retention: Monthly Required Sessions

Cohort or Year Round

EBP Curriculum	Program Type
Nurturing Parenting Program (NPP)/ for parents of school age children ages 5-11 years (workshops)	Group Parenting Education Basis for Recruitment: Participants Basis for Retention: Total Required Sessions

Scope of Services – Activities Section

<p>EBP Curriculum:Nurturing Parenting Program (NPP)/ for parents of infant, toddlers, and preschoolers (home visiting)</p> <p>Required or Optional:Required</p> <p>Activity Name: Home Visits - Weekly</p> <p>Home visit activities are delivered by family coaches, social workers and/or nurses on a weekly basis to promote maternal and child health, support child development, parenting skills and/or 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.</p> <p>Approaches to Implementation:</p> <p>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, or dance. Each session consists of approximately two lessons. Make-up sessions will also be provided when necessary and will be conducted by scheduling an 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.</p>	<p>Frequency:1 time(s) per week</p> <p>Intensity:150 minutes</p> <p>Duration:12 Months</p> <p>Sessions Offered: 24</p> <p>Total Required Sessions:19</p> <p>Monthly Required Sessions: 3</p> <p>Families:80 Parents: 85 Children: 80</p>
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Sessions Expected

Monthly Required Sessions

Sessions Expected Rolling Enrollment Programs



Activity	Calculation	Schedule Type	Active Months (C)	Monthly Required Sessions (D)	Sessions Expected (E)=C x D	Actual Units Service (F)	Retained Y/N F=>E
A	First day of attendance to last day of attendance	Rolling enrollment	4	3	12	9	No
B	First day of attendance to latest episode completion date or through date	Rolling enrollment	6.5	1.6	10	10	Yes

**Sessions expected round down*

Sessions Expected Cohort and Year-round



Activity	Calculation	Schedule Type	Active Months (C)	Monthly Required Sessions (D)	Sessions Expected (E)=C x D	Actual Units Service (F)	Retained Y/N F=>E
A	First day of attendance to latest episode completion date or through date	Cohort	4	3	10* Capped at 10 due to the required # of sessions	9	No
B	First day of attendance to latest episode completion date or through date	Cohort	6.5	1.6	10* Capped at 10 due to the required # of sessions	10	Yes

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

Sessions Expected Mixed Cohort and Rolling Enrollment

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



Activity	Calculation	Schedule Type	Active Months (C)	Monthly Required Sessions (D)	Sessions Expected (E)=C x D	Actual Units Service (F)	Retained Y/N F=>E
A	First day of attendance to latest episode completion date or through date	Rolling enrollment Subsequent	6.5	3	19	9	No
B	First day of attendance to latest episode completion date or through date	Cohort	6.5	1.6	6* Capped at 6 due to the required # of sessions. Actual Calculation would have been 10.4	6	Yes
C	First day of attendance to last day of attendance	Rolling enrollment Non subsequent	1.5	1	1	1	Yes

PARTICIPANT ACTIVITY- METRICS GRID





PARTICIPANT-ACTIVITY METRICS: ▾

Grid ▾

Search...



Activity	Participant Last N...	Active Months	Actual Units of Se...	Actual Days	Retention Particip...	Retention Family	Participant Met Re...	Total Sessions Exp...	Total Sessions Att...
PARENTING CONSUL...	Acevedo	3.2	9.00	9	1	1	Yes	9	9
PARENTING CONSUL...	Acevedo	3.2	9.00	9	1	1	Yes	9	9
PARENTING CONSUL...	Gonzalez	2.3	5.00	5	0	0	No	6	5
PARENTING CONSUL...	Perez	3.3	3.00	3	0	0	No	9	3
PARENTING CONSUL...	Diaz	2.3	5.00	5	0	0	No	6	5
PARENTING CONSUL...	Jiron	3.2	9.00	9	1	1	Yes	9	9

CONTRACT RETENTION

A vertical white line is positioned to the right of the main text, extending from the top of the word 'RETENTION' down to the bottom of the word 'CONTRACT'.

BASIS FOR UTILIZATION (BOU):

Criteria for program retention:

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graph TD; A[Criteria for program retention:] --> B[Participants: meet if retained for all activities]; B --> C[Families: meet if at least one participant retained for all activities];
```

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 %?

60 retained / 70 contracted = 86%

Contract Retention

BOU Families:

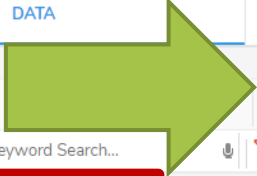
- 100 families recruited
- 50 families with at least 1 participant in family retained for all activities.
- 75 families contracted

What is contract retention %?

50 retained / 75 contracted = 67%

CONTRACT METRICS GRID





DATA

Reports

Progress

Assessments

Questions

CONTRACT METRICS - FS

Grid

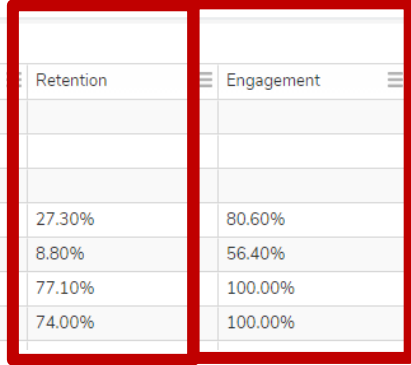
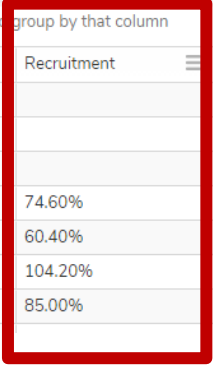
Views

Advanced Search 0 Keyword Search...

0 133

Drag a column here to group by that column

	<input type="checkbox"/>	Recruitment	Time Passed	Retained Families...	Retention Family	Retained Participa...	Retention Particip...	Retention	Engagement	Contracted CWD ...	Actual CWD Perc...	Inclusion of CWD...	Actual House
1	<input type="checkbox"/> View		100.00%		0.00%						0.00%		
2	<input type="checkbox"/> View		100.00%		0.00%						0.00%		
3	<input type="checkbox"/> View		100.00%		0.00%						0.00%		
4	<input type="checkbox"/> View	74.60%	100.00%	39	0.00%	45	27.30%	27.30%	80.60%	15.00%	83.40%	556.00%	25
5	<input type="checkbox"/> View	60.40%	100.00%	11	8.80%	12	4.80%	8.80%	56.40%	15.00%	29.00%	193.40%	22
6	<input type="checkbox"/> View	104.20%	100.00%	168	77.10%	169	32.70%	77.10%	100.00%	15.00%	26.50%	176.70%	60
7	<input type="checkbox"/> View	85.00%	100.00%	148	74.00%	148	37.00%	74.00%	100.00%	15.00%	41.80%	278.70%	71



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?

Contract	Engagement* Average Activity Engagement %
Activity	Engagement Average # sessions attended divided by Average # of sessions expected = Activity Engagement%

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?

$$5/5=100\%$$

$$8/12=66\%$$

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

*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?

$$4/6=67\%$$

$$7/10=70\%$$

$$67+70=137/2=68.5\%$$

*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



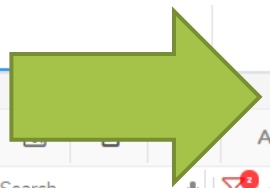
DATA

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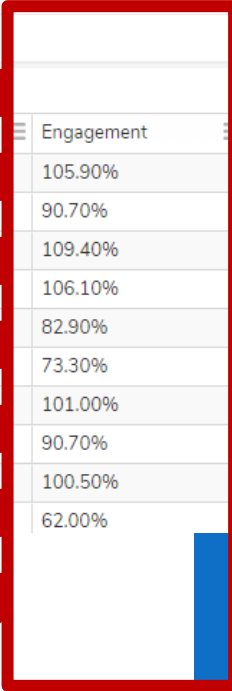
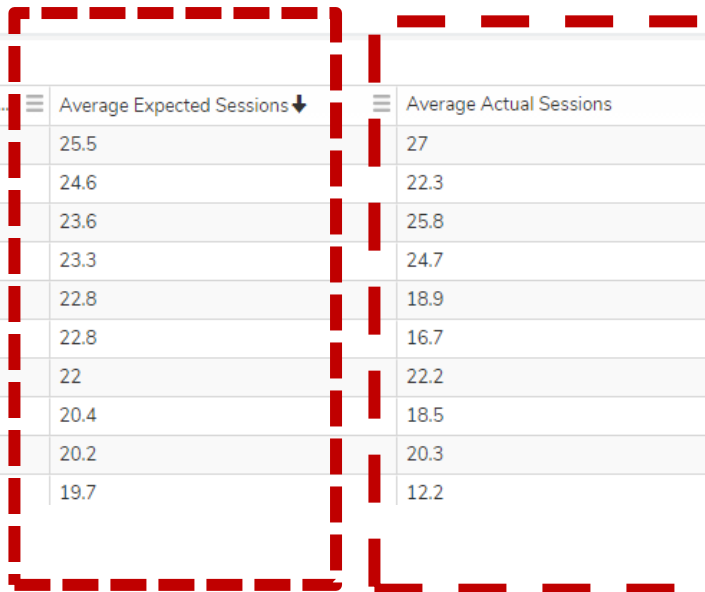
ACTIVITY METRICS - FS

Grid

Advanced Search 0 Keyword Search...

Click a column here to group by that column

	<input type="checkbox"/>	EBP Curriculum	Activity	Activity Included i...	Date Attendance ...	Time Passed	Retained Families...	Retained Participa...	Average Expected Sessions ↓	Average Actual Sessions	Engagement
1	<input type="checkbox"/>	Home Instruction for	Home Visits - Weekly	Yes	10/7/2020	100.00%	108	108	25.5	27	105.90%
2	<input type="checkbox"/>	Parents as Teachers (	Home Visits - Weekly	Yes	7/31/2019	100.00%	14	27	24.6	22.3	90.70%
3	<input type="checkbox"/>	Parents as Teachers (	Home Visits - Weekly	Yes	10/30/2020	100.00%	19	35	23.6	25.8	109.40%
4	<input type="checkbox"/>	Home Instruction for	Home Visits - Weekly	Yes	1/7/2020	100.00%	124	124	23.3	24.7	106.10%
5	<input type="checkbox"/>	Nurturing Parenting P	Home Visits - Weekly	Yes	11/6/2019	100.00%	35	82	22.8	18.9	82.90%
	<input type="checkbox"/>	Nurturing Parenting P	Home Visits - Weekly	Yes	8/17/2020	100.00%	42	88	22.8	16.7	73.30%
7	<input type="checkbox"/>	Parents as Teachers (	Home Visits - Weekly	Yes	9/5/2019	100.00%	92	181	22	22.2	101.00%
8	<input type="checkbox"/>	Parents as Teachers (	Home Visits - Weekly	Yes	8/4/2020	100.00%	50	100	20.4	18.5	90.70%
9	<input type="checkbox"/>	Parents as Teachers (	Home Visits - Weekly	Yes	3/14/2020	100.00%	14	27	20.2	20.3	100.50%
10	<input type="checkbox"/>	Nurturing Parenting P	Home Visits - Weekly	Yes	8/31/2020	100.00%	13	13	19.7	12.2	62.00%



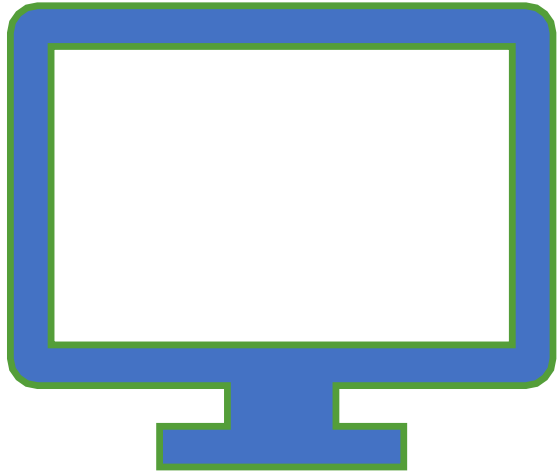


TRUST CENTRAL GRID DEMO

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*



TCT WEBSITE DEMO

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

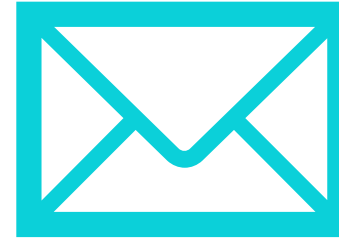
Data at different
levels

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

Questions