

Effective Use of Home Visits

A Supervisor's Companion Guide

This guide provides supervisors with an overview of the online blended learning series for caseworkers, Effective Use of Home Visits. It includes recommended strategies supervisors can use to teach best practices and support staff as they use these skills with the children and families with whom they work.



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Overview

This guide:

- Provides **links to three online content sessions** on planning; conducting; and documenting and debriefing home visits;
- Reviews **three field application assignments** designed to help your caseworkers apply skills learned in the sessions with the families with whom they work; and
- Provides **recommendations** for ways you can use the course material with your staff and support them as they apply the skills.

About the Series

The *Effective Use of Home Visits* series consists of:

Session One: *Planning for Effective Home Visits*

Session Two: *Conducting Effective Home Visits*

Session Three: *Documenting and Debriefing Effective Home Visits*

Quality Home Visits

Child and Family Service Review findings have shown an association between a positive rating on caseworker visits to positive ratings on other areas of review.

The Children's Bureau, U.S. Department of Health and Human Services believes that one of the most important ways to promote positive outcomes for children and their families is to ensure the quality and frequency of caseworker visits with the children and families in the agency's care.

There are three options for the series:

1. **Independent Study:** Caseworkers complete the short, self-directed online courses at their desk and apply the concepts learned as they complete visitations with families on their case load.
2. **Supervisor Directed:** Caseworkers complete the short, self-directed online courses independently or with others on your unit. Then, you provide follow-up support using any of the recommendations you'll find in this guide.
3. **OCWTP Directed:** Caseworkers complete the series through a scheduled event with an RTC. Caseworkers discuss their experiences with a facilitator and colleagues during a two-hour Guided Application and Practice (GAP) online meeting and conference call.

Supervisor Directed: Make the Series Work for You

Use the components and resources of this course in several ways. For example, components can be used with individual staff or whole units; you can identify specific areas to focus on that staff need to strengthen (such as documentation); or you can plan to have staff complete the entire program and use unit meetings to process content and share results of the field application assignments.

For each session, this guide includes:

- Key learning points
- Indicators that staff may have learning needs
- Suggestions for supporting your staff during or after they have taken the course
- Ways to customize the learning session to meet the needs of your staff

We recommend that you first review each self-directed course to identify the components and delivery strategy that best meets your staffs' needs. As you review the courses, use the worksheet below to capture your ideas for how to best use the resources with your staff.

[Open And Print Your Worksheet](#)

Session One: Planning for Effective Home Visits

Key Learning Points

- Every home visit should have a clear purpose. Your worker should be able to identify the purpose and be prepared to articulate that to the family.
- Preparing for the visit includes planning how to accomplish the purpose, including who needs to be there, topics to discuss, and issues that may arise.
- Preparation also includes planning for worker safety, making decisions whether someone should accompany the worker, or deciding if the visit should occur elsewhere.

[View Course One](#)

[Open And Print Course One Field Application Assignment](#)

Indicators Further Development and Support is Needed

- *Lack of preparation for the visit:* Caseworkers who prefer to “drop in” on families when convenient for the workers are often unproductive and unfocused. It may also be disrespectful and awkward for families.
- *Lack of specific purpose for each visit:* This often results in visits that consist merely of “chit chat” and ramble without focus.
- *Avoidance of home visits:* This can be due to several reasons, such as concern about “dirty homes”, discomfort driving in certain rural or urban areas, not wanting to take the time, not wanting to discuss certain topics, etc. You will need to explore this issue with your worker.

Strategies to Support Your Staff

- Review and discuss worker's Session One Reflection Log and Field Assignment. Identify strengths and new learning opportunities.
- Help staff understand that while the frequency of home visiting may be determined by rule and policy, every visit has a purpose that should be established ahead of time. This guides staff to plan conversations, gather necessary forms or case plans beforehand, identify needed services or resources, and consider potential problem areas.
- Provide protected planning time for staff.
- Encourage staff to express any concerns they have about home visits. Assure them you will be available to help. Allow them to talk about any personal preparation that may be necessary such as building confidence, becoming familiar with the surroundings, rehearsing a necessary confrontation, etc.

Ways to Customize Session One

As you read these suggestions, check those you want to do in your unit.

- When discussing preparation for the visit, workers often say they don't have time. Ask staff to identify one home visit they felt "prepared" for and how that affected the outcome of the home visit. Discuss the value of time spent.
- Conduct a discussion about how unit or agency procedures could be changed to allow the necessary time for preparation.
- Identify sources of SACWIS data and reports, location of agency files, and protocol for case record information requests that are specific to your agency.
- Identify different cultural groups that exist in your area and discuss implications for the home visit.
- Consider ways a worker could routinely record the purpose of each home visit on in-house forms, sign-out sheets, activity logs, etc.

- Discuss worker safety issues in general and focus on issues specific to the county (high crime areas, known drug usage, gang involvement, etc.) Discuss how this may impact how the home visit is conducted.
- Discuss agency protocol in transferring cases and the importance of sharing information to prepare the next worker.

Session Two: Conducting Effective Home Visits

Key Learning Points

- Engaging the family is an integral part of any home visit. Furthermore, many activities conducted during home visits will be structured to keep the family engaged.
- Visits should focus on a stated purpose, with a clear goal and flexible agenda.
- Regardless of the purpose, children’s safety, permanence, and well-being should be assessed (or reassessed) at every visit.
- Caseworkers should be aware of potential worker safety concerns and continue to be alert in homes and neighborhoods.
- Workers should conclude visits with summary statements and plans for next steps.

[View Course Two](#)

[Open And Print Course Two Field Application Assignment](#)

Indicators Further Development and Support is Needed

- *Caseworker reports and/or documents home visits that all sound the same:* Caseworkers should be careful to individualize family visits, particularly regarding assessment of safety factors, child vulnerabilities, the parents' protective capacities, and progress towards completion of case plan objectives.
- *Extremely short or extremely long visits:* There is no optimal length of time for a home visit as this will depend on the purpose of the visit and the family's needs. However, a pattern of extremely short visits may indicate avoidance or extremely long visits may indicate difficulty setting boundaries and becoming overly involved in the case.
- *Caseworker reports only negative home visits:* This may indicate the caseworker is struggling to identify family strengths.

Strategies to Support Your Staff

- Review and discuss your worker's Reflection Log and Field Assignment for Session Two. Identify strengths and new learning opportunities.
- Encourage staff to disclose any difficulties they have engaging a family, conducting specific conversations, or concluding the home visit. Assure them these activities will be easier with some families, more challenging with others, and perhaps not even possible in some cases.
- Many supervisors believe they can only get a true picture of how a worker conducts a home visit by accompanying them. While this may be a time management challenge there are many advantages to observing and supporting a worker in the field.

Ways to Customize Session Two

As you read these suggestions, check those you want to do in your unit.

- In place of, or in addition to, the two caseworkers from the self-directed course who described their efforts to engage families, ask seasoned caseworkers to share how they

have attempted but failed to engage a family in the past and what they have learned about engagement since then.

- Conduct a conversation about the "average" length of time for home visits. What guides this? Are there agency barriers that force workers to shorten visits? Are there expectations around the length of time that are more a matter of "the way we do things" versus what may be needed in a particular case?
- Assure workers know the importance of assessing for safety, permanence, and well-being and what each of these entails. Review these slides in the online course and ask the group for specific examples of how they conduct these assessments with families they currently serve.
- For families with case plans, remind staff how to access the plans and use them to review objectives and activities with the family. Discuss agency protocol regarding the ability to remove or copy files from the agency and what information may or must be provided to the family.
- Continue the discussion of worker safety from the previous session. Discuss agency protocol regarding emergency assistance; when and how to call law enforcement; emergency numbers of appropriate agency personnel; and any other agency safety protocol and precautions.
- In place of the situations presented in the section on handling distractions (being offered food or drink and visiting in a chaotic home) ask staff to identify distracting situations they have encountered and describe how they were handled. Remind staff that mistakes can be as valuable in learning as success stories.

Session Three: Documenting and Debriefing Effective Home Visits

Key Learning Points

- Lack of proper documentation leads to “inadequate planning and intervention, critical judgment errors, and poor outcomes for clients”. (Reamer, 2005)

- Documentation must follow the rules of professional writing. It is a concrete, concise record of an event or condition that should include well-defined descriptors.
- There are several helpful tips to taking notes while in the family home that may reduce resistance and engage the family in providing information to your worker.
- Staff should proactively prepare to debrief home visits during supervision to:
 - Discuss case-related information, such as their assessment conclusions, progress towards case plan fulfillment, etc.
 - Monitor SACWIS and court related completion dates
 - Develop casework skills, such as assessment, interviewing, case planning, etc.
 - Manage their feelings about clients
 - Prevent burnout
- Workers should plan for supervisory conferences and bring questions and agenda items to the conference.

* Reamer, F. G., (2005). Documentation in social work: Evolving ethical and risk-management standards. *Social Work* (50, 4).

[View Course Three](#)

[Open And Print Course Three Field Application Assignment](#)

Indicators Further Development and Support is Needed

- Documentation that appears to be the same for all family visits
- Documentation that is either too short (missing critical information) or too long (contains rambling, irrelevant information)

- Avoidance of supervisory conferences; keeping the discussion at a superficial level; or failure to use discussion of home visits to further develop casework skills

Strategies to Support Your Staff

- Encourage staff to capture and record information on their activity logs as soon as possible, particularly if they are conducting back-to-back home visits.
- Review and discuss your worker's Session Three Reflection Log and Field Assignment. Identify strengths and new learning opportunities.
- Encourage your worker to plan for supervisory conferences with you and identify agenda items for the conference.
- Discuss at least one home visit in depth with the caseworker to help further develop his or her casework skills.
- Consider using the checklist, [Supervisor Checklist – Individual Case Conferences](#), to help structure your supervisory conference.

Ways to Customize Session Three

As you read these suggestions, check those you want to do in your unit.

- Assemble and review a packet of all agency forms and guidelines for documenting home visits. Include Activity Logs, relevant SACWIS reports, community service provider referrals and summary reports, court referrals or reports, case summaries, narratives used in preparation for supervisory case conferences; etc.
- Clearly describe the expectations of each document as it relates to home visits (length of narrative, required components, degree of detail, style [formal or informal], etc.)
- Identify well-written home visit documentation from agency files and identify the twelve key documentation elements as described in the online course.

- Develop unit guidelines for documentation with your staff. Encourage your staff to offer their ideas and suggestions. Include any agency or unit compliance findings that suggest information is missing or incomplete.
- Prepare and disseminate a pre-conference checklist of what you expect from workers when debriefing their home visits. Refer to [Supervisor Checklist - Individual Case Conference](#) for suggestions. Encourage discussion and suggestions from staff, being sure to elicit their expectations as well.

Additional Resources

Capacity Building Center for States – [Quality Matters: Improving Caseworker Contacts With Children, Youth, and Families](#) (2017)

Ohio Department of Job and Family Services (ODJFS) - [Best Practice Guidance in Determining How Often to Visit Case Members](#) (2019)

ODJFS - [Generating the Comprehensive Visitation Report](#) (2019)