



Guidance for Completing the Personal Visit Observation Tool

The [*Personal Visit Observation Tool*](#) is a resource for supervisors, monitors, and home visitors to regularly review and, as needed, address the quality of personal visits delivered to families.

Overview

The [*Personal Visit Observation Tool*](#) is intended to assist programs with meeting the following requirements for those using *Demonstrating Fidelity*:

- > Within six months after *Foundational Training* and again at one year, new home visitors are observed conducting at least one personal visit and provided with feedback.
- > Home visitors in their second year of employment and beyond are observed by the supervisor or lead home visitor delivering a personal visit and provided with written and verbal feedback at least annually.
- > The supervisor or lead home visitor uses the [*Personal Visit Observation Tool*](#) to conduct personal visit observations.

The [*Personal Visit Observation Tool*](#) is comprised of three main sections:

1. Visit preparation
2. Personal visit elements
3. Home visit process quality

Sections 1 and 2 assess specific content and delivery of the visit based on

the supervisor or monitor's understanding of the planning process, the family, and the specific visit plan. Four of the seven scales from the Home Visit Rating Scales – Adapted & Extended (HOVRS-A+) guide supervisors and monitors in assessing the visit's overall process and effectiveness. The use of the items in each of these sections together results in a comprehensive observation.

Each section of the [*Personal Visit Observation Tool*](#) is described below, along with guidance to supervisors and monitors on how to use the observation tool effectively to enhance the quality of personal visits.

Before the observation

Visit preparation

Prior to conducting the observation, ensure that the home visitor has obtained verbal permission from the family whose visit will be the focus of observation. Demographic sections of the [*Personal Visit Observation Tool*](#) can be filled out ahead of time, including: home visitor name, if the home visitor is first year or second year and beyond, observer

name, observer title/role, if it is the six-month or annual observation, and the date of the observation as well as family name, child name, child's age, and child's date of birth.

Set aside at least 30 minutes before the visit to engage the home visitor in a discussion about the overall approach to the visit, rationale for the content of the written visit plan, and any other information pertinent to the visit.

Also use this time to share with the home visitor the items on the observation tool and the process that you will use to conduct the observation and to provide feedback afterward.

The discussion of visit preparation should include review of the selected Foundational Personal Visit Plan or completed [*Personal Visit Planning Guide*](#) and then completion of Items 1 through 8 of the [*Personal Visit Observation Tool*](#) (e.g., was the written plan complete, did the home visitor consult additional resources when creating the plan, etc.).

This discussion will also help direct what you look for during the observation of the visit. For example, if a Foundational visit plan is being used,

you would expect to observe the content focused on in this plan. Or, if the child is behind on immunizations, it would be expected to see discussion of the importance of medical care and the ways in which the family could access it.

Completing the visit preparation items

Choose to mark “Yes” or “No” as appropriate for each of the eight visit preparation items. Discuss each with the home visitor or take notes during the discussion and complete the ratings after the discussion has ended.

An optional seven-point scale is provided at the end of the visit preparation section to capture a rating of the overall quality of the home visitor’s visit preparation (1 = Inadequate visit preparation; 7 = Excellent visit preparation). The rating given should be based on the pattern of “Yes/No” responses to items 1 through 8 as well as the supervisor or monitor’s expert judgment of how well the home visitor planned for the visit. This scale can be useful for tracking progress over time.

During the observation

Upon arrival at the family’s home, everyone present should be introduced to the family and to let them know that an observation of the visit and the home visitor is being conducted as a way

of making sure the program delivers high-quality services. Be clear that the purpose is not to actively participate in the visit or to evaluate the family in any way.

The “Personal visit elements” section of the [Personal Visit Observation Tool](#) follows the general sequence of a personal visit: opening, parent-child interaction, development-centered parenting, family well-being, and closing.

An additional section, “Across the visit,” contains items that occur throughout a personal visit and are not tied to a particular area of emphasis.

The final section, “After the visit,” includes items related to documentation of services that are required when the visit has been completed.

Completing the “Personal visit elements” items

Until the supervisor or monitor is comfortable with using the [Personal Visit Observation Tool](#) while observing personal visits, it is a good idea to take notes during the observation and then complete the “Yes/No” ratings afterward. As familiarity with the process of observing and using the tool increases, the goal should be to transition to marking “Yes/No” responses to those items directly on the observation tool during the observation. This will maximize efficiency.

Several “Key strengths” and “Key recommendation” boxes are provided throughout the tool for note taking and for summarizing key points that support the ratings.

The “After the visit” items should be rated when the *Personal Visit Record* has been completed and can be reviewed for consistency with the observed visit.

An optional seven-point scale is provided at the end of the “Personal visit elements” section to capture a rating of the overall quality of the home visitor’s delivery of the personal visit elements. Detailed definitions of the rating scale anchors (1 = inadequate; 3 = Adequate; 5 = Good; 7 = Excellent) are provided to help guide this rating. This scale can be useful for tracking progress over time.

Completing the “Home visitor skill” items

To measure home visitor skill, four scales from the HOVRS – A+ are provided at the end of the [Personal Visit Observation Tool](#), along with detailed instructions on completing and scoring these scales. The scales include:

- > Home visitor responsiveness to family
- > Home visitor relationship with family
- > Home visitor facilitation of parent-child interaction
- > Home visitor family non-intrusiveness/collaboration with family



After the observation

Reflective supervision and quality assurance

Ideally, immediately after the personal visit has ended there will be a brief discussion with the home visitor to discuss the supervisor or monitor's thoughts and general impressions of how the personal visit went. This brief discussion also gives home visitors the opportunity to reflect on how they felt about the visit right after it occurred.

During the next reflective supervision meeting, time should be devoted to a deeper discussion of the observation, including sharing the completed [Personal Visit Observation Tool](#). The approach to this discussion should be strengths-based, and additional support in the form of training/professional development should be offered if there are concerns identified. If concerns are identified, observation of the home visitor should take place on a more frequent schedule (e.g., every six months) to ensure that visit quality is addressed in a timely way.

Additional tips for a successful observation:

- > Obtain the written plan and completed visit record for the visit that happened prior to the one that will be the focus of the observation. This will provide context for the observation, such as

helping evaluate the appropriateness of the written plan.

- > Examples of a completed [Personal Visit Planning Guide](#) and *Personal Visit Record* are also available for review on the Fillable Forms tab where home visitors access the *Foundational Curriculum*.
- > Consider audio- or videotaping the home visit as a strategy for conducting the observation; videotaped home visits can also be used for peer-to-peer coaching or other professional development activities.