Site-to-Site Mentoring Guide

Revised September 2022

INTRODUCTION

The HFNY Multi-Site System includes a process for connecting seasoned program managers to new programs and new program managers. Peer support from seasoned program managers (referred to as “Mentors”) is one of the most effective means of assisting the start-up of new programs and orienting new program managers (referred to as “New PMs”). Mentors can share their skills, knowledge and hands-on experiences, as well as offer the necessary support and encouragement. This helps assure that new program managers get the best start toward operating a high-quality program.

The Site-to-Site Mentoring Guide was developed by members of Central Administration, and we are grateful for input from program managers Roxanne Monroe, Joe Paté, Carol Peeling, Karen Riewerts, and Sarah Scorsone.

The Guide includes:

- General expectations and roles of the Mentor, the New PM and Central Administration
- A checklist so you can track the topics you cover
- Suggested discussion topics and activities for you to engage in with the New PM

The New PM has also been given this Guide to help them develop questions and be able to best utilize your support. In addition, the New PM will have completed a Needs Assessment at the New Program Manager Orientation. The New PM’s Program Contract Manager will share this with you. (A sample of this can be found in the PMO manual.)

We recognize that each program manager comes to their new role with a variety of experiences and will therefore have different needs. This Guide offers a framework for discussions and activities for sharing knowledge and skills. It also helps the new program manager know what to ask for in the context of the mentoring relationship. Both parties should feel free to modify the materials in ways that make sense for them.

We hope you enjoy your role as a mentor. All of the Central Administration partners recognize that you are making a commitment of your time and thank you again for your willingness to participate.

Sincerely,

Allison Contento
Program Supervisor, Healthy Families New York
Office of Children and Family Services

"No man is an island, entire of itself; every man is a piece of the continent, a part of the main." —John Donne

GENERAL EXPECTATIONS

Central Administration:

1. Central Administration partners provide input for matching mentors with new program managers. Criteria will include but not be limited to the similarity of host agencies and regional proximity.
2. Program Contract Managers will send the "Invitation to Mentor" letter along with this Guide to the selected program manager. This letter will include general information about whom they are being asked to mentor.
3. New program managers will be provided the Guide at the New Program Manager Orientation by the PCANY trainer. If mentoring commences prior to their attendance at that orientation, their Program Contract Manager will send the Guide to them.
4. See the final page of this document for "Central Administration Steps for Assigning Mentors."

Mentor/New PM:

1. Before agreeing to participate in the mentoring program, potential mentors will have reviewed this Guide.
2. New PMs receive formal training on most of the topics included in this Guide. It is not expected that mentors will provide training. *What is most valuable is that they share their own experiences related to the topics.*
3. The Mentor and the New PM can each maintain the Mentoring Checklist. This will help structure their time and keep it focused on key aspects of program management. If the New PM does not feel the need to cover particular topics, they can be skipped. Likewise, if there are topics not included in this Guide that either wants to discuss, they can be included on the checklist under "Other Topics."
4. In addition to working directly with the New PM, there are various activities (for example, observations of home visits, FROG surveys and supervision sessions) that the Mentor may arrange at his or her site for the New PM (and for other staff, if this is a new program).
5. There is <u>no set amount of time assigned to the mentoring relationship</u>. The Mentor and New PM can figure out what makes sense for them. For example, for the first 4 months, they might agree to do a visit every other month and have 2 phone calls per month. For the second 4 months, they might decide to do 2 visits over the 4-month period, and 1 call per month. Or, some dyads may decide to do fewer in-person visits and add a few more phone calls. There would likely be e-mail correspondence to offer additional support.

MENTORING CHECKLIST – SUGGESTED TOPICS

This checklist contains suggested topics. They are listed in alphabetical order and not in any order of importance. In discussions between the two program managers, it is helpful to use the items from the New PM's Needs Assessment to identify topics that will be addressed, and in what order. If there is not a need to address a topic, mark it "n/n" for "not needed."

Topic	**Date(s) Covered**
Advisory Committee	
Best Practice Standards	
Capacity Building	
Groups and Events	
Internal Quality Assurance	
Management Information System	
Management Skills	
Personnel/Staffing	
Program Manager as Supervisor	
Performance Indicators and Reports (Quarterly and Annual Service Review)	
Self Care and Team Building	
Training	
Welcome to HFNY/Interfacing with the Multi-Site System	
Other Identified Topics:	

SUGGESTED DISCUSSION TOPICS AND ACTIVITIES

Where applicable, refer to HFNY state policies and your program-specific policies.

ADVISORY COMMITTEES

Role and Formation of Committee:

- Share the role your advisory committee plays in your program and how you interface with it.
- Describe how your committee was formed, the different organizations and people who sit on it and the thinking behind who was invited to join.

Operation:

- Describe the logistics and scheduling of your meetings.
- Share agendas, meeting minutes, and any strategies you've used to ensure attendance at meetings.
- If available, share Memoranda of Understanding (MOUs) you have with members of your committee.
- Annual reporting and feedback from Advisory Board on the Annual Service Review and Equity Plan (formerly the Cultural Analysis and Plan.)

Notes:

BEST PRACTICE STANDARDS

Policy and Procedure Manual:
- Provide time for the new PM to review your manual and describe the process you used to develop it.
- Talk about how you keep your manual up-to-date, how revised policies are developed and reviewed by staff, and how this is documented.

Accreditation:
- If applicable, share your experience going through the accreditation process, highlighting lessons learned and benefits you recognized for the program and HFNY.

Self-Assessment Tool (Self Study):
- If available, let the New PM see your most recent self-assessment tool.
- Show the New PM where to find the electronic self-assessment tool.

Notes:

CAPACITY BUILDING AND OUTREACH TO THE COMMUNITY

Building Capacity:

- Describe your experiences reaching your target community, including efforts you've made to enroll families early in pregnancy, and universal screening of pregnant women or newly parenting families in your target area.
- Share any plans you have implemented to reach and maintain capacity.
- Review Management Information System reports (for example, the Capacity Building Report and the Screen/Referral Summary Reports) and other outreach tracking systems. Share how these help you to build your capacity and reach participants and community organizations on a routine and regular basis.

Outreach to Community Organizations:

- Describe efforts you've made to advocate for your program and create partnerships with other organizations where your target population can be found, including how your Advisory Committee is part of this effort.
- Share any "scripts" and other materials (for example, slide shows, videos) you and your staff use during presentations to community organizations. If applicable, share how all of your staff is involved in outreach efforts.

Outreach to Participants:

- Share samples of your program's outreach materials as well as lessons learned from developing these materials to best match your target community.

Notes:

GROUPS AND EVENTS

- Describe the types of groups and events your program facilitates and how they are organized.
- Share the benefits and challenges you see in having groups and events.
- Share policies, expectations for group participants, flyers for events, etc. that you have developed related to groups and events.
- If available, share an example of a group or event satisfaction survey.

Notes:

INTERNAL QUALITY ASSURANCE (QA)*

Quality Assurance Plan:

- Review the systems you have in place to assure that all required internal QA activities occur. Be sure and share your role as a program manager within these systems.

Quality Assurance Philosophy:

- Share the process you have in place to assure that information gathered from QA activities is reviewed, that feedback is provided to staff, and that recommendations from activities are implemented and tracked.
- Discuss how you make QA routine, regular, safe, enjoyable and transparent.

Quality Assurance Tools:

- Share your program's internal QA tools such as FROG survey, home visit and supervision observation forms, binder review forms, participant satisfaction surveys, staff satisfaction surveys, exit interviews with staff, and annual participant satisfaction surveys.

Notes:

**External* QA and TA is covered under the "Welcome to HFNY" category.*

MANAGEMENT INFORMATION SYSTEM (MIS)*

Data management:

- Describe your "data flow", i.e., how it gets from staff to supervisors and entered into or uploaded into the MIS.
- Share staff's experience with the MIS and the systems you have in place to ensure forms are on time, accurate and valid.
- Share strategies you've implemented to improve your performance targets and performance indicators.

Supervisor ticklers and reports:

- Share examples of ticklers and reports that program managers and supervisors find useful and how they incorporate them into their work in a routine fashion.
- Discuss how you and supervisors integrate tools tracked in the MIS, such as ASQs and PHQ9s, into on-going clinical work with staff.

Notes:

**Remind New PM that all training videos for the MIS are located under the Help and Docs tab.*

MANAGEMENT SKILLS

Strength based management:

- This might include discussing your work environment, how you balance administrative, clinical and reflective tasks, and thoughts about communication styles and techniques.
- Share thoughts about managing change and transition.
- Share what it means to you to be a relationship-based program and how that impacts your management style.

Time management:

- Share "tricks of the trade" that you use to organize yourself especially around reporting and other PM administrative requirements. Offer your sense of "A Day in the Life of a PM."
- Share a copy of a quarterly report and/or Annual Service Review, how you go about completing them, and how much time you allot.*
- Describe how much time to plan for Regional and Statewide meetings.

Interacting with your host agency

- Describe the types of support you get. This might include support around clinical supervision, budgeting, or fundraising.
- Discuss role clarity and how you balance the requests of your host agency with those of HFNY. Share successes and challenges integrating the HFNY program into your host agency.

Budgets:

- If this is part of your role within your organization, share experiences related to developing and managing your budget.
- While OCFS will orient the New PM to the Contract Management System (CMS), share information about your role as a program manager with the CMS.
- Share communication strategies between fiscal staff and program manager to facilitate a seamless process of submitting claims and reports to OCFS.

Notes:

**See Performance Indicators and Reports for more on this topic.*

PERSONNEL/STAFFING

Hiring process:

- Describe your hiring process, how you've recruited staff to meet the unique needs of your community and contribute to a healthy workplace culture, and any other lessons learned around hiring.

Staff retention:

- Share what has worked for your program around retaining staff. This might include building on the staff's strengths and passions, providing professional development opportunities, staff recognition, etc.
- Share the system your program uses to monitor staff satisfaction and retention, and what, if any, strategies you've implemented to address any identified issues.

Personnel Issues:

- Discuss the kinds of challenging personnel situations that can arise in a home visiting program and the kinds of support available to program managers. Include how you attend to staff safety both in and out of the office.
- Discuss issues related to role boundaries for staff (including PMs), sharing challenges and what has worked to help staff to understand and maintain professional boundaries.

Notes:

PROGRAM MANAGER AS SUPERVISOR

Supervising Supervisors and/or other Staff:

- Describe your schedule and routines around supervising supervisors or other staff.
- Reinforce the HFA supervision philosophy. Highlight strength-based approaches and how you enhance reflective capacity among staff and assure the areas of HFA supervision are included (administrative, clinical and reflective elements, CHEERS, Protective Factors).
- If possible, arrange for the New PM to observe you or another supervisor carrying out supervision.
- Share the form you use for supervising supervisors, and review the completed documentation for the observed supervision.

Supervising FRSs:

- As many program managers supervise FRS staff, share challenges and successes you've had around key FRS targets, i.e., universal screening, prenatal enrollment, acceptance rates, father involvement, and discussions related to capacity building.

Notes:

PERFORMANCE INDICATORS AND REPORTS (QUARTERLY, AND ANNUAL SERVICE REVIEW)

- Discuss the Performance Indicators report, where to obtain the data, preparation before reports are provided by CHSR, and how often this is completed by CHSR.
- Share what is required for the Quarterly OCFS report, including the data reports needed from MIS, the template for the narrative and TANF numbers needed.
- Discuss the Annual Service Review (ASR), including when it is due, content that it should cover, where to gather information, etc. Describe how you go about completing the ASR and, if available, let the new PM see a recent ASR that you completed. Be sure and include how the Equity Plan (formerly the Cultural Analysis and Plan) gets incorporated throughout service delivery, supervision and QA activities (for example, the annual Participant Surveys) and reporting the ASR information and Equity Plan to the Advisory Board.
- Discuss how Quarterly reports, MIS data report, and TANF numbers are reported to OCFS via CMS.

Notes:

SELF CARE AND TEAM BUILDING

Taking Care of Oneself:

- Discuss ways you've found to take care of yourself and "stay sane" at work. This might include closing your door at times during the day, taking a walk at lunch, and paying attention to your home/work life balance.
- Describe how you've reduced stress in your job. This might include delegating responsibilities, changing your staffing pattern, reaching out to Central Administration partners and program manager peers in the region for support, and building competence and self-reliance in other staff.

Supporting and Nurturing Staff/Establishing a Healthy Workplace Environment:

- Describe your program's culture and how you have developed and maintained a healthy workplace environment over time. Share lessons learned along the way.
- Describe your staff/team meetings and how they function. For example, scheduling, logistics, topics, and anything you do that seems unique.
- Discuss types of team-building activities you use. This would include formal activities (like wellness days) and less formal activities such as working on a project together, partnering to facilitate parent groups, providing lunch space and opportunities for fun and laughter.
- Share anything you did when your program was just starting, or when you were new, that worked well toward building your team in a time of transition.

Notes:

TRAINING

Meeting Training Requirements:

- Describe your role as a PM as it relates to staff training and tracking. For instance, registration for PCANY trainings and identifying potential staff training resources in your community.
- Describe systems you have to adhere to training standards, especially related to new staff and ensuring they have completed pre-training activities such as shadowing staff and attending prerequisite trainings. Include how you provide orientation, wrap-around, and on-going training to staff within the required timeframes, including FGP, prenatal and supervisor stop-gap trainings if needed.
- If available, share materials (i.e., an Orientation/Training Manual) you use for orientation and wrap around trainings.

Tracking:

- Answer questions related to how you use the MIS tracking system.
- Review materials used for tracking training such as checklists and MIS ticklers.

Notes:

WELCOME TO HFNY/INTERFACING WITH THE MULTI-SITE SYSTEM

Partners in the HFNY System:

- Review how and when you utilize partners in the state system including OCFS, PCANY, CHSR MIS and Evaluation staff, and other program managers.
- Facilitate the New PM to become a part of the HFNY Program Manager Google Group.

Visits from Central Administration Partners:

- Share your experiences with Quality Assurance (QA) and Technical Assistance (TA) (if applicable) visits from OCFS, PCANY and CHSR including preparation, content, follow-up and how you integrate feedback into program operations.
- Highlight the role of the program manager in preparing for the visit, including setting an open and supportive tone with staff so that everyone can learn from the visits.

Statewide Leadership and Regional Meetings:

- Describe these meetings, how the New PM can best benefit, and how you prepare for them.
- Check that the New PM knows of any upcoming meetings.

Resources

- Share where you have found helpful resources, such as the HFNY and HFA websites, including the backsides (protected sides) to those sites.
- Share where to find research data on the HFNY website, especially information you have used to develop presentations for various audiences.

Notes:

OTHER TOPICS (as identified by the two program managers throughout the course of their work together.)

Notes:

"There is nothing left to you at this moment but to have a good laugh." Zen Master

Central Administration Steps for Assigning Mentors

1. The new Program Manager Orientation (PMO) Trainers (one from each branch of CA: OCFS, PCANY and CHSR) identify PM Mentors for new PMs when reviewing their PMO Needs Assessments. The PM Mentor Tracking List is used to identify possible Mentors.
2. The OCFS Trainer notifies the Mentor PCM to send a request to the potential Mentor. This request includes the "Mentoring Guide Letter from OCFS" and the "Site to Site Mentoring Guide."
3. If the potential Mentor agrees, the Mentor PCM sends an email to connect the two PMs with the "Site to Site Mentoring Guide**" attached. This email goes to:
   - the Mentor
   - the Mentee (new PM)

   with cc's to:
   - the Mentee PCM (if different from the Mentor PCM)
   - the PCANY Trainer (Ellen)
4. If the potential Mentor declines to participate, the Mentor PCM sends an email to the OCFS Trainer who will inform the other two PMO Trainers. The PMO Trainers will identify another possible Mentor and start the process again.
5. PCANY Trainer updates/maintains the Mentor Tracking List.

**the Mentee will have seen this at the PMO however it is helpful for them to be sent it directly as they are inundated with a lot of documents.*