



Staff Recruitment and Retention Playbook

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About This Document

Key Driver Diagram

The Key Driver Diagram displays a shared theory of how outcomes might improve based on information gathered from research, observation, and experience, and sets forth the collaborative's goal. The primary drivers represent key components of the system that need to be in place to achieve the goal.

Change Package

The Change Package identifies a set of changes (i.e., how to put primary drivers in place) and offers links to PDSA examples and resources to support these interventions. The Change Package lays out change ideas to help home visiting programs improve the key outcome and processes.

Measurement System

The Measurement System Guide lists the shared aims and a set of common measures that teams will report during the collaborative.

Key Driver Diagram (KDD)

SMART Aim <i>The goal of the collaborative</i>	Primary Driver (PD) <i>Critical system elements that are necessary and sufficient to achieve the aim</i>	Secondary Drivers (SD) <i>Places where and times when changes can be made</i>
HV CollIN participants will work to improve the professional well-being of home visitors and home visiting supervisors, including: • Job and pay satisfaction, • Psychological well-being, • Self-efficacy and confidence, and • Job meaning and fulfillment. 85% of home visiting staff will report they always feel supported to manage their work and still be present for the families or staff they support.	PD1: Hiring practices	• When recruiting • When interviewing
	PD2: Home visiting workforce supports	• During initial and ongoing professional development • At reflective supervision
	PD3: Physical and psychological health, wellness, and balance of home visiting professionals	• For or during home visits • When assessing and developing policies & procedures • For or during administrative time
	PD4: Teamwork and communication	• Recognition and celebration • When developing plans for career path advancement • During staff meetings • Developing relationships and shared decision making between leadership and staff

Change Package

PD1: Hiring Practices

Secondary Driver (SD)	Change Ideas (for LIAs)	PDSA Examples	Resources
When recruiting	Create recruitment & outreach action plans to reach community members, including former program participants	SRR.PD1.SD1.C1.Example 1. Recruitment Fair SRR.PD1.SD1.C1.Example 2. Recruitment Flyer	• Head Start Program Performance Standards require programs to provide parents with the opportunities to participate in the program as employees or volunteers and offer resources to enhance parents' advocacy and leadership skills. • Introduction to Competency-Based Hiring • Sample job description (Family Support Specialist) • Sample process maps and recruiting and onboarding plans from participating teams • Why I am a Home Visitor video
	Partner with nearby community colleges / universities to introduce the home visiting field to students	SRR.PD1.SD1.C2.Example 1. Partnering with Community Colleges	
	Develop clear and accurate job descriptions that include home visiting competencies staff must bring to the job	SRR.PD1.SD1.C3.Example 1. Refine Job Descriptions	
	Use videos or live opportunities to shadow / experience a day in the life of a home visitor	SRR.PD1.SD1.C4.Example 1. Shadowing SRR.PD1.SD1.C4.Example 2. Video Testimonials	
When interviewing	Use interview panels that include home visitors to assess candidates and make hiring decisions	SRR.PD1.SD2.C1.Example 1. HV Rating Tool SRR.PD1.SD2.C1.Example 2. Interview Panel	• Conducting Family Services Staff Interviews from HeadStart offers tips for conducting interviews and sample interview questions. • Considerations for selecting candidates to interview
	Develop onboarding process that extends through the majority of the first year of work	SRR.PD1.SD2.C2.Example 1. Teaming Approach to Onboarding	

		SRR.PD1.SD2.C2.Example 2. Team Approach to Training	- Onboarding series: - Home Visiting 101- Importance of Home Visiting - Home Visiting 102- Home Visitor Skills and Strategies - Home Visiting 103- Professional Practice The First Six Months Workbook examines the onboarding process from the supervisor perspective with a focus on helping new staff manage the stressors of a job in the field of child and family services. Sample interview questions from a home visiting program
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PD2. Home visiting workforce supports

Secondary Driver (SD)	Change Ideas (for LIAs)	PDSA Examples	Resources
During initial and ongoing professional development	Provide mentoring / coaching / leadership program for all staff, including tailored opportunities	SRR.PD2.SD1.C1.Example 1. Rounding Form SRR.PD2.SD1.C1.Example 2. New Hire Buddy	- Access the Institute for the Advancement of Family Support Professionals for live and on demand trainings, certifications and resources. The Essentials of Home Visiting from Start Early offers online, self-paced courses and live webinars where professionals can earn early childhood CEUs.

	Offer in person and online workshops, conferences, and professional development courses that align with professional goals	SRR.PD2.SD1.C2.Example 1. Professional Goals Growth Assessment	• MCH Navigator offers online learning opportunities for those in the maternal and child health field. • Training Survey for Home Visitors
	Home visitors serve as program representatives at advisory board, leadership, or partner meetings	SRR.PD2.SD1.C3.Example 1. Provide Updates to Board of Health	
At reflective supervision	Provide reflective supervision training and mentoring for home visiting supervisors	SRR.PD2.SD2.C1.Example 1. Joint Reflective Supervision Planning Form SRR.PD2.SD2.C1.Example 2. Supervisor Training	• Beyond the Home Visit: Supervision, Professional Development and Community Connections Module • Head Start's Early Childhood Learning & Knowledge Center offers Tips on Becoming a Reflective Supervisor and Supervisee, as well as a number of videos and other supports to assist with the development and application of reflective skills. • Getting Ready for Reflective Supervision Form • Example Rounding Form from Help me Grow • Reflective Supervision series: ○ Reflective Supervision 1: Reflective Practice for Family Support Professionals Module ○ Reflective Supervision 2: Foundations in Reflective Supervision for Supervisors Module • Reflective Supervision: A Planning Tool for Home Visiting Supervisors
	Schedule consistent reflective supervision for all staff (home visitors, supervisors, program leads) with shared agenda setting	SRR.PD2.SD2.C2.Example 1. Reflective Supervision Agenda Setting SRR.PD2.SD2.C2.Example 2. HV Input on Reflective Supervision	
	Do routine assessment of professional goals, growth areas, and stretch goals at least annually	SRR.PD2.SD2.C3.Example 1. Professional Growth Plans	

			- The Home Visiting Rapid Response team offers a recorded webinar and tip sheet to support high-quality virtual reflective supervision. - The Minnesota Department of Health successfully piloted and then implemented a mentoring approach to support home visiting supervisors in building their reflective supervision capacity. - Your state's infant mental health association can help connect home visiting programs with trained reflective mentors and consultants.
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PD3. Physical and psychological health, wellness, and balance of home visiting professionals

Secondary Driver (SD)	Change Ideas (for LIAs)	PDSA Examples	Resources
For or during home visits	Use mobile apps to check in / know home visitors' location in the field	SRR.PD3.SD1.C1.Example 1. Mobile Check In	- Apps like Life360, Connecteam, Safepoint, and PeopleSafe among others offer real-time location of members in your private network, receive alerts when staff arrive or leave the office or other set locations, and set up network chats. - Home visitors worked with their supervisor to revise the safety protocol for home visits (e.g., texting supervisor to confirm safe return from home visit). - Programs developed home visit reminder cards with contact number and work hours for home visitors and a list of resources that can be accessed in an emergency.
	Provide support and communication for staff on setting clear boundaries and expectations with program participants (re: availability outside normal business hours)	SRR.PD3.SD1.C2.Example 1. Contact Cards	
	Offer discrete and non-threatening mechanism for staff to report events that may cause physical or psychological harm	SRR.PD3.SD1.C3.Example 1. HR Meeting	

	Create well-balanced, reasonably sized caseloads	SRR.PD3.SD1.C4.Example 1. Assessment Due Dates	
	Schedule protected time for scheduling visits, data entry	SRR.PD3.SD1.C5.Example 1. Protected Time for Charting SRR.PD3.SD1.C5.Example 2. Balanced Workloads	
When assessing and developing policies & procedures	Write clear and transparent policies and communication around personal time off and flex time for hours worked outside of typical workday (e.g., family leave)	SRR.PD3.SD2.C1.Example 1. Flex Time	This brief from the National Home Visiting Resource Center summarizes research to answer questions such as: “what factors contribute to home visitors’ mental health and well-being?” and “how can home visiting programs reduce stressors and support home visitors?”
	Create workplace policies or benefits that support physical and psychological well-being and safety including during pandemics and other disasters	SRR.PD3.SD2.C2.Example 1. Pandemic and Disaster Policy	
For or during administrative time	Provide access to routine infant early childhood mental health consultation and Employee Assistance Program	SRR.PD3.SD3.C1.Example 1. Access to Mental Health Support	• 5-4-3-2-1 Coping Technique for Anxiety

	Incorporate staff wellness and mindfulness techniques into team meetings, daily routines, and workflow	SRR.PD3.SD3.C2.Example 1. Staff Walk SRR.PD3.SD3.C2.Example 2. Mindfulness Activities During Reflective Supervision SRR.PD3.SD3.C2.Example 3. Mindfulness Activities During Team Meetings	
	Incorporate process for engaging in difficult conversations	SRR.PD3.SD3.C3.Example 1. Team Commitments	

PD4: Teamwork and Communication

Secondary Driver (SD)	Change Ideas (for LIAs)	PDSA Examples	Resources
Recognition and celebration	Develop formal and informal staff recognition processes that incorporate individual preferences for forms of recognition	SRR.PD4.SD1.C1. Example 1. Preferences for Recognition SRR.PD4.SD1.C1. Example 2. Gratitude Activity	- Pebbles, or the things that “get in the way of a good day,” can be surfaced using the techniques described in the “What Matters to You?” Conversation Guide (Appendix A of the IHI Framework for Improving Joy in Work). - Create a virtual or physical “shout-out” board or appreciation tree where coworkers can recognize the contributions and accomplishments of others. WorkTango is an employee experience platform that offers an online system for peer-to-peer and organizational recognition.
	Use huddles, debriefs, and team activities to reflect on and celebrate team successes	SRR.PD4.SD1.C2. Example 1. You Rock SRR.PD4.SD1.C2. Example 2. Celebrating Success	

When developing plans for career path advancement	Develop task force with home visiting program staff and relevant organization and awardee leadership to build buy in and engage in strategic planning on incentives, career pathways, and living wage	SRR.PD4.SD2.C1. Example 1. Early Childhood Task Force SRR.PD4.SD2.C1. Example 2. PD Reimbursement	- Consider benefits and reimbursement policies when assessing inequities (e.g., the Home Visiting Career Trajectories Study found variability in insurance premiums across home visiting programs, and 50% of home visitors reported that reimbursement provided for traveling to home visits was insufficient). - Provide tuition reimbursement / scholarship dollars for home visitors who wish to advance their education while remaining in the job. Iowa's PAEYS program for supplementing home visitor pay Iowa's TEACH scholarships for family support professionals
	Develop Lead and Senior home visitor positions for those who stay in the job	SRR.PD4.SD2.C2. Example 1. HV Trainers	
	Partner with agency and awardee leadership to build buy in, develop, and implement plan to conduct internal / state / regional audit to assess and respond to gaps in pay	SRR.PD4.SD2.C3. Example 1. Pay Study	
During staff meetings	Incorporate team building activities to build trust and familiarity between co-workers	SRR.PD4.SD3.C1. Example 1. "If" Ice Breaker SRR.PD4.SD3.C1. Example 2. Physical Icebreakers	Gallup Employee Engagement Survey High 5 Test is a strengths assessment tool designed to understand each team member's strengths and apply a strength-based approach to career growth. Maximizing team and Peer Networks to Improve Family Outcomes Module
	Use strength-finder and / or leadership style resources to identify individual and collective strengths, particularly at times of change	SRR.PD4.SD3.C2. Example 1. Presenting Insights SRR.PD4.SD3.C2. Example 2. Strength Finders	
	Use regularly scheduled staff social events or shared meals to promote team building	SRR.PD4.SD3.C3. Example 1. Team Building Lunch	

Developing relationships and shared decision making between leadership and staff	Train leadership staff in participative management, team building, and consensus decision-making	SRR.PD4.SD4.C1. Example 1. Collaborative Agenda Setting	The Institute for Healthcare Improvement (IHI) white paper "IHI Framework for Improving Joy in Work" includes change ideas to help leaders develop understanding and shared decision making with staff.
	Leaders intentionally spend time connecting to the work of the home visiting program (e.g., attending parent group, shadowing HV)	SRR.PD4.SD4.C2. Example 1. Parent Group	

The Measurement System

Overview of Measures

SMART AIM	Outcome Measure
HV CoIIN participants will work to improve the professional well-being of home visitors and home visiting supervisors, including: • Job and pay satisfaction • Psychological well-being • Self-efficacy and confidence • Job meaning and fulfillment	85% of home visiting staff report they always feel supported to manage their work and still be present for the families or staff they support.

Primary Drivers	Process Measures
Hiring practices	Less than 90 days between when a position is posted and when it is filled
Home visiting workforce supports	• 90% of home visiting staff report the reflective supervision they receive always plays a role in motivating them in their work • 90% of reflective practices are always implemented by home visiting supervisors.
Physical and psychological health, wellness, and balance of home visiting professionals	85% of indicators of staff wellness (work/life balance, stress management, and self-care) always occur for home visiting staff.
Teamwork and communication	90% of indicators of positive workplace climate (recognition, respect, and teamwork) always occur for home visiting staff.

In-Depth Look at Measures

The following measures were selected to reflect the processes necessary to achieve the SMART aim. They are listed in the order in which these processes occur in many sites and are labeled with the Primary Driver they reflect.

Measure #1 (Primary Driver 1):

Time between when a position is posted and when it is filled

- For each home visiting position filled during the reporting month, a count of the total number of days between when that position was posted and when it was filled

- Survey item [Data Manager only]:
 - For each home visiting position filled last month, how many days were there from the time the position was posted to when it was filled?

Measure #2 (Primary Driver 2):

% of home visiting staff reporting the reflective supervision they receive always plays a role in motivating them in their work

- Numerator: Total number of “always” responses to the relevant survey item
- Denominator: Total number of responses to the relevant survey item, excluding “N/A”
- Survey Item [All staff]:
 - The reflective supervision I received played a role in motivating me in my work.
 - Never, rarely, occasionally, often, or always

Measure #3 (Primary Driver 2):

% of reflective practices that home visiting supervisors report they always have the ability to implement

- Numerator: Total number of “always” responses to the relevant survey items
- Denominator: Total number of responses to the relevant survey items, excluding “N/A”
- Survey Items [Staff providing reflective supervision in the last two weeks]:
 - I had the ability to properly prepare.
 - Never, rarely, occasionally, often, or always
 - I had the ability to greet my supervisee(s).
 - Never, rarely, occasionally, often, or always
 - I had the ability to invite supervisee(s) to help set priorities for our time together.
 - Never, rarely, occasionally, often, or always
 - I had the ability to invite dialogue to allow my supervisee(s) to share their story.
 - Never, rarely, occasionally, often, or always
 - I had the ability to seek to understand my supervisees’ perspectives by summarizing with concrete observations.
 - Never, rarely, occasionally, often, or always
 - I had the ability to engage with supervisee(s) throughout the entire session.
 - Never, rarely, occasionally, often, or always
 - I had the ability to work with supervisee(s) to develop concrete next steps.
 - Never, rarely, occasionally, often, or always

Measure #4 (Primary Driver 3):

% of indicators of staff wellness (work/life balance, stress management, and self-care) that home visiting staff report always occur

- Numerator: Total number of “always” responses to the relevant survey items

- Denominator: Total number of responses to the relevant survey items, excluding “N/A”
- Survey Items [All staff]:
 - I felt satisfied with my work/life balance.
 - Never, rarely, occasionally, often, or always
 - I was able to manage the stress associated with my job.
 - Never, rarely, occasionally, often, or always
 - I had an opportunity to engage in self-care.
 - Never, rarely, occasionally, often, or always

Measure #5 (Primary Driver 4):

% of indicators of positive workplace climate (recognition, respect, and teamwork) that home visiting staff report always occur

- Numerator: Total number of “always” responses to the relevant survey items
- Denominator: Total number of responses to the relevant survey items, excluding “N/A”
- Survey Items [All staff]:
 - I felt like I was part of a team working towards something meaningful.
 - Never, rarely, occasionally, often, or always
 - My leader(s) showed that they knew about the work that I do.
 - Never, rarely, occasionally, often, or always
 - My leader(s) showed that they care about the work that I do.
 - Never, rarely, occasionally, often, or always
 - My leader(s) acknowledged me for what I do.
 - Never, rarely, occasionally, often, or always
 - My colleague(s) acknowledged me for what I do.
 - Never, rarely, occasionally, often, or always
 - We celebrate success within our team.
 - Never, rarely, occasionally, often, or always

Measure #6 (SMART Aim):

% of home visiting staff reporting they always feel supported to manage their work and still be present for the families or the staff they support

- Numerator: Total number of “always” responses to the relevant survey items
- Denominator: Total number of responses to the relevant survey items, excluding “N/A”
- Survey Items [All Staff]:
 - I felt supported to manage my work and still be present for the families I serve.
 - Never, rarely, occasionally, often, or always

- I felt supported to manage my work and still be present for the staff I support.
 - Never, rarely, occasionally, often, or always

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