

# How we plan for a monitoring visit tikanga



## Purpose

The purpose of this tikanga is to describe planning for a monitoring visit. The visits must operate as per the 14-week monitoring schedule. This tikanga applies once we have determined the communities we will be monitoring.

## Roles and responsibilities

The Monitoring Manager is accountable for the monitoring visit. They lead the planning of a visit with support from their monitoring teams. They are responsible for making sure all milestones are met within the agreed timeframes, and that everyone has what they need to do their job. The Monitoring Manager starts planning for a monitoring visit at least four-weeks before the 14 - week schedule begins. During those four weeks the Monitoring Manager will:

- determine how to cluster the sites in the area being visited
- let the Oranga Tamariki Relationship Manager and leadership teams of other monitored agencies know when the visits will begin and how we have clustered the sites
- let Health, Education, and Police regional staff know that we will be visiting their community
- confirm the members of the team for the visit
- schedule key dates for monitoring activities as per the 14-week monitoring schedule
- begin to develop the list of agencies to engage with in the community, including the monitored agencies and the care partners
- start to engage the team in conversations about existing relationships in the community and see if anyone in the team is suited to be the initial contact
- once the list of agencies is confirmed, consider if any could be potential connectors
- begin the *Plan on a page*, including identifying risks and relevant mitigations

During weeks one to four of the 14-week monitoring schedule, the Monitoring Manager will work with their team to:

- identify who will reach out to each cohort to start planning the logistics such as dates, times and locations
- plan engagements
- complete the *Plan on a page* and submit to Governance for approval
- finalise the itinerary for the visit.

Monitoring managers distribute tasks equitably across their teams and staff wellbeing is factored into the planning. The Monitor's *Managing our time tikanga* provides guidance on how we look after our staff and their wellbeing during a monitoring visit.

### **Determine how Oranga Tamariki sites will be clustered**

Clustering sites is about planning a monitoring visit effectively and efficiently and impacts on how we interview groups and how we share back our findings at the end of a monitoring visit. Factors that may influence how we cluster sites include, how close sites are geographically, how many sites are in a region, whether sites share services, staff crossover, and whether they contract the same providers. Once the team determines the cluster, the Manager informs the Data and Insights team, the Oranga Tamariki Relationship Manager, and the key contact of the other monitored agencies.

An example of how we cluster sites and what that means in terms of how we conduct engagements is outlined in the box below.

**Example of how we cluster sites:**

We are planning a monitoring visit that includes three Oranga Tamariki sites, Site (A), (B), and (C). We determine from conversations with Oranga Tamariki staff and the *About Communities* information that Site (A) operates differently to the other two sites and works with different community providers and government agencies. Sites (B) and (C) share many of the same services and contract the same providers. We determine that the most effective and efficient way to cluster sites is to combine sites (B) and (C) and keep site (A) separate.

Now that we have confirmed how we will cluster sites we organise our monitoring visit so that we can engage under these clusters. If we go back to the example provided above and if we decide to hold group hui, we might:

- conduct joint interviews with Oranga Tamariki staff from sites (B) and (C)
- conduct joint interviews with community providers and government agencies who are contracted to provide services to sites (B) and (C)
- conduct joint interviews with tamariki, whanau, and caregivers from sites (B) and (C)
- name our notes 'sites (B) and (C)'
- treat site (A) as a site-specific monitoring visit.

This is one example and there will be many different scenarios, for example where the Oranga Tamariki sites are geographically spread out and the services they use are in one area. In this situation you may choose to bring the sites together in a logical middle point, potentially where the other providers or agencies are. The important factor is that the clusters support the resources and timeframes allocated to a monitoring visit and that the priority engagements are able to be met.

**Confirm the team for a monitoring visit**

Monitoring managers consider the number, expertise, and experience of staff when confirming the team for a monitoring visit. Each monitoring team will have the right cultural

expertise for the communities we are visiting, experience engaging with tamariki and rangatahi, and experience monitoring.

## Schedule key dates

The Monitoring Manager ensures all key dates and tasks are completed within the agreed timeframes. This includes the setting a date for wānanga and inviting the facilitators as well as the sharing back meetings. The key activities that need to be booked are outlined in the 14-week schedule.

## Identify who we talk with and who makes contact

When we plan for a visit, there are two groups we engage with - tamariki, whānau, and caregivers usually via connectors, and those who are providing a service to tamariki in care including, monitored agencies, community providers, and government agencies.

As per the *Who we engage with* Tikanga a priority is to identify the agencies that we will engage with in the community. In the four weeks leading up to week one of the monitoring visit, managers and some of the team will have been working on this and may already have contacted some agencies. If there are several agencies to still connect with the Manager is responsible for assigning team members to make contact.

We always meet with monitored agency staff when we visit communities. We inform the Oranga Tamariki Relationship Manager/s (or key contact of other monitored agencies) that we will be visiting a community. It is their role to inform their staff in that community of the visit and to provide us with a contact list of relevant contacts. The *About Communities* information also includes a contact list of monitored agency staff if we do not already have this information.

Before we engage with Health, Education, and Police staff we always inform relevant regional staff first.

## Plan engagements

### Plan engagements with tamariki, whānau, and caregivers

Once we have agreed with agencies that they will be connectors, we plan our engagements with them, including when and where an engagement takes place. When we plan engagements with tamariki and rangatahi we ask connectors:

- the age, ethnicity, and languages of the tamariki and rangatahi we will talk with
- something they like to do or any hobbies to support our initial chat
- how best to communicate with the tamariki.

These questions help us to meet their communication needs and address any accessibility issues.

### Plan engagements with monitored organisations, community providers, and government agencies

We have the option to conduct one-to-one or group hui with monitored agencies, community providers, and government agencies. The *How we use our prompts tikanga* and our *How we note take tikanga* provides more details about how to plan engagements and record information.

## Finalise the itinerary

Finalising the itinerary is about confirming dates and times people can meet with us. Once we have confirmed with people and organisations that are willing to engage in kōrero, we send them the information they need so that their participation is fully informed, and so they understand our kaupapa.

The itinerary is shared with the team coordinator, so they can arrange koha, travel, accommodation, car hire, venue bookings and catering. The business expenditure policy outlines this process.

## Identify and mitigate risks

There are a range of risks that can impact on a monitoring visit. These risks can include time management issues, staff shortages, small numbers of cohorts to talk with, Covid 19,

and natural disasters. The Monitoring Manager is responsible for identifying risks and putting actions in place to mitigate the risk. Identifying and mitigating risks is an ongoing process throughout the planning and implementation stages of the monitoring work.

This information is included in the *Plan on a page* which must be completed and sent to the Chief Monitor for approval.

Once the visit is planned, the Monitoring Manager continues to support staff for the visit with a day to support preparation and ongoing skill development and practice.