COMPREHENSIVE FIDELITY & QUALITY ASSURANCE CHECKLIST

Head Start & Early Head Start Family Services Advocates

Observation and case-review instrument for supervisors and quality assurance teams.

JOYFIELDS Evidence-Based Solutions

A JOYFIELDS INSTITUTE COMMUNITY

ADVOCATE _____ SUPERVISOR / ASSESSOR _____

OBSERVATION / REVIEW DATE _____ TOTAL SCORE _____ / 100

RATING EACH ITEM ☐ Met — full points ☐ Partial — half points ☐ Not met — zero ☐ N/A — exclude and prorate

SECTION I · ROADMAP PHASE — 28 POINTS · 4 ITEMS

Family Assessment & Goal Setting

FOCUS Building a strengths-based, family-driven Partnership Agreement.

#	STANDARD	MET / PARTIAL / NO / N/A	SCORE
1.1	**Strength-Based Assessment** Did the Advocate identify and document at least 3 unique family strengths, assets, or protective factors (e.g., strong extended family support, problem-solving skills) rather than focusing solely on immediate crisis needs?	☐ ☐ ☐ ☐	___ / 7
1.2	**Family-Driven Goal Alignment** Are the goals in the Family Partnership Agreement (FPA) written using the family's own words and aspirations (e.g., “I want to finish my GED this fall” vs. “Mother requires educational compliance”)?	☐ ☐ ☐ ☐	___ / 7
1.3	**SMART Goal Structuring** Does each goal feature clear, actionable steps, assigned responsibilities, and specific target completion dates?	☐ ☐ ☐ ☐	___ / 7
1.4	**Informed Consent & Family Rights** Did the Advocate clearly explain confidentiality standards, family rights, program expectations, and the Release of Information (ROI) process?	☐ ☐ ☐ ☐	___ / 7

SECTION I SUBTOTAL _____ / 28

SECTION II · ACTIVE WORK PHASE

Advocacy, Linkages & Resource Coordination

28 POINTS · 4 ITEMS

FOCUS Empowering families and ensuring warm, effective referrals.

#	STANDARD	MET / PARTIAL / NO / N/A	SCORE
2.1	**Warm Handoff Referral** When linking families to external resources (e.g., housing support, mental health services, adult education), did the Advocate facilitate a direct introduction or three-way connection rather than simply handing over a contact number?	☐ ☐ ☐ ☐	___ / 7
2.2	**Self-Advocacy & Empowerment Modeling** Did the Advocate coach and empower the family to navigate systems independently (e.g., role-playing a call to a landlord or agency) instead of completing tasks on their behalf?	☐ ☐ ☐ ☐	___ / 7
2.3	**Proactive Barrier Identification** Did the Advocate work with the family to anticipate potential obstacles (e.g., transportation, childcare, scheduling conflicts) that might prevent goal achievement or attendance?	☐ ☐ ☐ ☐	___ / 7
2.4	**Crisis Intervention & Stabilization** If emergency needs arose (food insecurity, housing instability, domestic issues), were immediate supportive services provided without derailing long-term family goals?	☐ ☐ ☐ ☐	___ / 7

SECTION II SUBTOTAL _____ / 28

SECTION III

Child Attendance, Health & Developmental Support

21 POINTS · 3 ITEMS

FOCUS Integrating family engagement with child outcomes.

#	STANDARD	MET / PARTIAL / NO / N/A	SCORE
3.1	**Attendance Support & Case Management** Did the Advocate proactively track attendance patterns, initiate supportive outreach for unexcused absences, and co-create an attendance plan if attendance fell below 85%?	☐ ☐ ☐ ☐	___ / 7
3.2	**Health & Dental Requirement Follow-Up** Is there documented evidence of tracking and supporting the family to complete required physicals, dental exams, and immunizations within 45–90 days of enrollment?	☐ ☐ ☐ ☐	___ / 7
3.3	**Transition Planning** Are there documented strategies supporting the child and family's upcoming transition (e.g., Early Head Start to Head Start, or Head Start to Kindergarten)?	☐ ☐ ☐ ☐	___ / 7

SECTION III SUBTOTAL _____ / 21

SECTION IV · AUDIT-READY STANDARDS

Documentation & Compliance

23 POINTS · 3 ITEMS

FOCUS Ensuring clean, defensible, and timely recordkeeping in your child management software (e.g., ChildPlus).

#	STANDARD	MET / PARTIAL / NO / N/A	SCORE
4.1	**Case Note Quality — the "Golden Thread"** Does every progress note clearly connect back to an established Family Partnership Agreement goal or emergency response plan?	☐ ☐ ☐ ☐	___ / 8
4.2	**Objective & Defensible Writing** Are case notes written professionally, objectively, and without personal bias, assumptions, or judgmental language?	☐ ☐ ☐ ☐	___ / 8
4.3	**Timely Data Entry** Were case notes, contact logs, and referral updates entered into the system within the agency's required window (e.g., within 24–48 hours)?	☐ ☐ ☐ ☐	___ / 7

SECTION IV SUBTOTAL _____ / 23

Score summary

SECTION I · / 28

SECTION II · / 28

SECTION III · / 21

SECTION IV · / 23

TOTAL POINTS EARNED · / 100

FIDELITY PERCENTAGE · %

If any item is scored **N/A**, subtract its point value from the denominator and calculate the percentage against the adjusted total.

Fidelity scoring & action plan

LEVEL	SCORE	STATUS	RECOMMENDED ACTION
High Fidelity	90% – 100%	Exemplary Practice	Meets institutional & federal standards. Eligible for Peer Mentorship role.
Moderate Fidelity	70% – 89%	Minor Practice Drift	Targeted supervision; assign specific refresher modules in family engagement.
Low Fidelity	< 70%	Critical Drift	Immediate 1-on-1 supervisory action plan and bi-weekly case audits required.

Supervisor notes & follow-up

IDENTIFIED STRENGTHS

TARGETED GAPS / REMEDIATION STEPS

AGREED NEXT STEPS & REVIEW DATE

ADVOCATE SIGNATURE

DATE

SUPERVISOR / ASSESSOR SIGNATURE

NEXT REVIEW DATE

REGULATORY BASIS

This instrument evaluates whether family engagement and case management practices meet federal Head Start Performance Standards — **45 CFR § 1302 Subpart E, Family and Community Engagement Services**. Retain completed checklists in the advocate's supervision file as evidence of ongoing fidelity monitoring.