

Monitoring is an important formal safeguard for individuals served through CLBC. Monitoring activities are intended to help protect the safety, health, well-being, and rights of individuals receiving CLBC funded services; and provide an opportunity for Service Providers to share learning about what is working well, and areas requiring support.

CLBC has a responsibility to both fund *and* ensure supports meet quality service standards. Informed by feedback received from Service Providers, CLBC has developed a common approach to how we monitor service delivery and quality. CLBC uses standard tools and procedures to ensure that Monitoring Visits are conducted by CLBC staff in predictable, transparent, and consistent ways across the Province.

#### *What is the purpose of Monitoring Visits?*

Monitoring visits provide specific points in time during the year for CLBC to personally meet with Service Provider staff at the program level to learn about service delivery, the quality of services, and the impacts of services on individuals. These visits provide an opportunity to discuss successes and challenges, and to learn how policies and systems are operationalized on a day-to-day basis. Monitoring visits are also a good time to identify and talk through any issues that may benefit from joint problem solving, learning, and follow-up support, as well as to talk with individuals about their experiences and quality of life.

#### *How should my agency prepare for a Monitoring Visit(s)?*

Service providers may find it helpful to prepare in advance of a monitoring visit to ensure that relevant information is readily available for review before, and during monitoring. Program Managers and staff should be prepared to speak to and provide documentation and evidence that supports compliance with *Service Terms and Conditions for Contracts between Community Living British Columbia and Service Providers* (T&C), and other relevant CLBC policies and guidance documents. The Analyst may request that you provide some of the resources below, and/or a sampling of completed records for review, and/or discussion.

Please provide the following selected documents to [Click or tap here to enter text.](#) by date: [Click or tap to enter a date.](#) If document(s) are not selected to be sent, please still be prepared to review, and/or provide this information during the monitoring visit:

- |   |   |
|---|---|
| <input type="checkbox"/> Calendars/Logbooks   | <input type="checkbox"/> Procedures for Medication Administration and Storage             |
| <input type="checkbox"/> Planning resources, tools, and procedures  | <input type="checkbox"/> Procedures for the Storage of Toxic Products & Cleaning Supplies |
| <input type="checkbox"/> Agency or program policies and procedures  | <input type="checkbox"/> Accreditation or Licensing plans, or Quality Improvement Reports |
| <input type="checkbox"/> Behaviour Support and Safety Planning; and monitoring/support of implementation                    | <input type="checkbox"/> Complaint reports, satisfaction surveys, and outcomes            |
| <input type="checkbox"/> Internal tracking, trend-analysis, and response to Critical Incidents and non-reportable incidents | <input type="checkbox"/> Privacy Training and Certificates of Completion                  |
| <input type="checkbox"/> CLBC Reporting (i.e.: Service Level, Periodic, Occurrence, etc.).                                  | <input type="checkbox"/> Other <a href="#">Click or tap here to enter text.</a>           |

**CLBC Staff:** If applicable, provide additional details as to documents being requested, such as dates, names, etc.

[Click or tap here to enter text.](#)

### ***What will be covered during the Monitoring Visit(s)?***

The Monitoring Visit is an opportunity to review agency and program successes and highlight emerging trends. CLBC staff will seek to gain a deeper understanding of service delivery, service quality, and safeguards. There are four areas that service providers can expect to be addressed as part of the Monitoring Visit:

- Contract service levels
- Changes from the last monitoring visit
- Formal safeguards and policy compliance
- Person-centred service delivery and quality of life for individuals

CLBC staff will explore and seek to validate compliance with items included in the T&C, including Outcomes, Service Requirements, Standards, and relevant CLBC Policies. Monitoring Visits that occur at locations where services are delivered may also include a site inspection to ensure health and safety measures exist and are sufficient (i.e.: fire extinguishers and first aid kits).

CLBC staff will provide relevant CLBC updates related to changes to policy and procedures, or upcoming training or networking opportunities. Service Providers are encouraged to identify quality improvement goals. Follow-up or agreed-upon action steps will be discussed and identified.

### ***What if I need to reschedule?***

We understand that unexpected events may arise that will require you to reschedule a visit; please communicate with your Analyst about this as needed, and to determine a better time for the visit to occur.

### ***What if my agency or program has already identified goals or changes needed as part of our broader strategic planning?***

This is expected and encouraged; please bring these areas forward to your Analyst. CLBC is a learning organization and understands that developing and sustaining quality service is part of a continuous process that involves learning, growth, and change. Although we do not expect perfection – we do expect agencies to have an awareness of their program and staff's strengths and successes – as well as gaps, needs and opportunities for improvement or progress. Monitoring visits are intended to provide a safe forum for these discussions, and to help build mutual understanding of priorities and next steps.

### ***What happens if the Monitoring Visit identifies areas where our agency is not fully meeting standards, T&C, or policy expectations?***

CLBC recognizes that communication with Service Providers should be ongoing and support two-way dialogue for shared learning, feedback, and collaboration. To acknowledge the completion of the Monitoring Visit, CLBC staff will send a letter summarizing observations within 30 business days of the completion of the Monitoring Visit.

Monitoring visits are detailed and look at a variety of areas – so it is common that opportunities for improvements are identified during this process. These opportunities are intended to lead to further discussion or development and will be clearly summarized for you in the follow-up letter.

*Summaries or Considerations* are suggested areas that could benefit from development, though are not required. *Recommendations* or areas of *Deficiency* are linked to contractual obligations, T&C, Standards, Service Requirements, Reporting, outcomes, or health and safety. When a Recommendation or Deficiency is identified, an action plan will be requested from you that details the steps your organization will take to achieve the required outcome within an identified timeline; follow-up discussions will take place with your Analyst to review progress. It is important to note that Deficiencies reflect more serious concerns and could result in a contract termination if the identified corrections or improvements are not achieved.

Remember - CLBC wants to support all Service Providers to be successful with meeting service requirements, standards, and expectations - if you have questions or need assistance, your Analyst is here to help.

***What if I disagree with a recommendation or deficiency that has been identified?***

Recommendations or Deficiencies will have been identified based on observed information gathered during the monitoring cycle. If you disagree or have questions about why a Recommendation or Deficiency has been identified, please bring this discussion to your Analyst to request more information. If needed, Integrated Service Managers, or Associate Integrated Service Managers may be able to assist with these conversations, to ensure collaborative and mutual understanding of program strengths, needs, and opportunities for improvements. Follow-up monitoring visits or tasks may also be required, to gather additional, relevant information.

***If you have any other questions or concerns – please reach out to your Analyst directly for support.***

CLBC is committed to monitoring supports and services to ensure that individuals have access to quality services and that funding is used effectively. Monitoring is an essential component of our work to promote accountability and develop a culture of continuous quality improvement.

As our valued partners, we welcome your feedback on these practices and procedures. If you have additional questions about CLBC's approach to Monitoring, please contact your local CLBC office.

We appreciate our relationships with service providers, and the positive impacts this work has for individuals in our community. We look forward to our next monitoring visit with your agency.