

new client onboarding packet

making the most of your ECS site visit



epiphanycommunityservices.com

419-402-4270 | Swanton, OH

An ECS client, Hancock County ASAP out of Britt, Iowa, has helped us develop the following steps to help your organization have the most successful ECS site visit possible.

1. Schedule your ESC visit around your coalition meeting.

We feel it's important that our coalition members know who ECS is and what they do for us. We also want ECS to get to know our members, their backgrounds and what resources they bring to the table.

2. Have ECS staff give a report.

We like to have ECS tell our coalition members what they are doing that's working and where they need to make improvements. We feel it helps remind the members to take ownership in the work of the coalition and they are the key to success, not the coalition staff members.

3. Ask ECS to do a short training.

Pick an area that your coalition needs to improve on and have ECS do a short "walk through". For example, our coalition goal for the upcoming year was to focus more on environmental change. ECS talked about what an environmental change is, what makes it impactful, and what all goes into making it successful.

4. Have ECS accompany you on a visit to your fiscal agent (optional/ as applicable).

For us, our relationship with our fiscal agent is key to how we operate. We schedule a short visit for ECS to answer any questions for our fiscal agent regarding the work we are doing and the progress we are making. Having ECS present in a meeting with our fiscal agent has helped improve communication and expectations between our coalition, staff, and our fiscal agent.

5. Data Review.

To make sure we are actively working towards our goals we like to have a data review session with ECS. Here we review our Reach entries and other data to see how they are aligning to our logic model and this also shows us a breakdown of where our efforts are being focused. By reviewing the data, it allows us to make an informed decision on how to proceed with our work and where we might need to focus more of our resources.

On the following page, you will find two sample schedules for your ECS site visit.



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Sample Schedule of a 1-day ECS Site Visit

Day 1

9 am - 11 am	Evaluation committee meeting discussion with ECS on data review, internal evaluation committee, process, progression, tracking, and goals.
11 am - 1 pm	Visit with staff to discuss how things are going within the coalition, the progress of work, questions on REACH, future goals, and any concerns we have with our fiscal agent.
1 pm - 3 pm	Coalition meeting ECS provides some training to coalition members and offers input on the strategies the coalition is working on.
3 pm - 4 pm	Debrief meeting/ wrap up the day. Create a “to-do list” and answer any remaining questions.

Sample Schedule of a 2-day ECS Site Visit *(2-day site visits are not expected or required)*

Day 1

9 am - 11:30 am	Visit with staff to discuss how things are going within the coalition, the progress of work, questions on REACH, future goals, and any concerns we have with our fiscal agent.
11:30 am - 1 pm	Evaluation committee meeting discussion with ECS on data review, internal evaluation committee, process, progression, tracking, and goals.
1 pm - 3 pm	Debrief meeting/ wrap up day 1. Create a “to-do list” and answer any remaining questions.

Day 2

9 am - 11:30 am	Visit with staff to discuss coalition meeting and expectations.
11:30 am - 1 pm	Coalition meeting ECS provides some training to coalition members and offers input on the strategies the coalition is working on.
1 pm - 2 pm	Debrief meeting with staff and create a “to-do” list.
2 pm - 3 pm	Wrap up visit (optional visit with fiscal agent)

The schedules above are just samples of what your visit with ECS could look like and we are flexible about scheduling around already determined coalition or evaluation meetings.



practical solutions to complex problems