



NEW MEXICO

Early Childhood
Education & Care Department

**Family Support and Early
Intervention Division**
HOME VISITING



HOME VISITING PROGRAM MANAGER TOOLKIT



CENTER FOR
DEVELOPMENT
& DISABILITY



2024

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INTRODUCTION

This Toolkit supports home visiting program managers to understand and develop systems to support their leadership to home visitors who provide services to families enrolled in home visiting programs funded through the New Mexico Early Childhood Education and Care Department (ECECD). The toolkit discusses the impact leadership has and looks at the following systems: home visiting, communication, program planning and service system design, ongoing monitoring and continuous quality improvement, and training and professional development. There are more systems that program managers will need to work within and the ECECD Manager Monitors can be a guide through compliance systems and the Early Childhood Services Center (ECSC) Data Team will be a guide through the data entry and reporting systems.



THE SHADOW OF A LEADER



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THE SHADOW OF A LEADER

According to Fivecoat Consulting Group, Goldman Sachs coined the term "Leadership Shadow" to describe the impact your leadership makes. Your Leadership Shadow is made up of what you say, how you act, what you prioritize, and how you measure. Your influence as a manager, whether positive or negative, extends to your team. The culture within your team is shaped by your actions, decisions, and communication. If you want your leadership to make a difference, you must understand your impact and the shadow you cast.

The four elements of the Leadership Shadow according to the Fivecoat Consulting Group:

- What you say – Written and spoken words, non-verbal cues, the context you set as you send a message, and what you repeat or emphasize.
- How you act – Behaviors, symbols, and relationships. You are a role model for your team, both your positive actions/behaviors and your negative ones.
- What you prioritize – What you value. If you say people are the most important thing in the organization, how much time do you spend with your people? Your most powerful prioritization tool is who you interact with and your routine of meetings and engagement. They are critical in developing your leadership shadow.
- How you measure – What you choose to reward, recognize, and what you hold your team accountable for in order to determine effectiveness. Understand the second and third-order effects of the key performance indicator you focus on.

QUESTIONS FOR REFLECTION AND DISCUSSION:

1. How do I involve my team? How am I transparent about the process? How can I ask them for input and get them to build their own leadership shadow?
2. Am I thinking, acting, prioritizing, and measuring consistently?
3. Looking at the month-long review of my calendar, can I identify what I am prioritizing and what I am not?
4. How do I help the staff reach their goals?
5. Who can I get feedback from and create a professional development plan to make sure what I say, how I act, what I prioritize, and how I measure is authentic and consistent?



HOME VISITING SYSTEMS



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COMMUNICATION SYSTEMS



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COMMUNICATION SYSTEMS

A communication system ensures information is exchanged with individuals so they can be fully involved in the program activities and group decisions for quality services for children and families. Effective communication flows to and from home visitors, families, program leadership, governing bodies, and community agencies. **HV Standard 6.6 details communication systems required by ECECD.**

MEETINGS

Scheduling regular meetings with staff is important because they provide home visitors with the opportunities to discuss their thoughts, ideas, successes, and concerns in a comfortable and collaborative environment.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. What is the structure and format of team meetings? Do we meet in person, via Zoom, or a combination?
2. How often are team meetings scheduled? Do we meet weekly or monthly?
3. Do meetings have an agenda, desired outcomes, and notes?
4. How do we determine the effectiveness of the meetings?

STAFF INPUT

Receiving input from staff fosters a collaborative environment that can improve productivity and help home visitors feel valued. This is done when home visitors take an active role in your team's processes and you listen to their input. The importance of responding promptly to staff, even if you don't have an immediate answer, cannot be overstated. It contributes to a positive team culture by fostering trust, open communication, and a sense of collaboration.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. What opportunities do I give the staff to provide input?
2. How do I plan on using the information?

EXTERNAL COMMUNICATION

Communication with the ECECD Home Visiting Support Team, community agencies, and other home visiting programs is important in the delivery of quality home visiting services. Knowing the expectations of ECECD Manager Monitors and communicating frequently is essential to leading a successful home visiting program. Monthly meetings are scheduled with the ECECD Manager Monitor, ECSC Data Team, and UNM Center for Development and Disability (CDD) Home Visiting Consultant. Developing relationships and communicating with community agencies that your program may refer families to as well as receive referrals from is vital to meeting the needs of the community and families.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. How do I prepare for my monthly meetings with ECECD, ECSC, and UNM CDD to make the time productive?
2. What are some strategies to build collaborative relationships with community agencies? How can I support home visitors to build these relationships?
3. How can I develop collaborative relationships with other home visiting programs?

FAMILIES

Developing a communication system with families is important to help share information and build trust. Trust plays a critical role in maintaining partnerships with families. Effective communication with families, including fathers, is important for continued family engagement in home visiting services.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. How do we communicate to families from the agency level?
2. How is communication delivered so all families receive the same information? Implementing a newsletter is one method that can be an effective and versatile means of communication, providing an accessible source of information for all families within a home visiting program.
3. What is the tone of the forms used/shared with families? Are they inclusive, strengths-based, and family-friendly?
4. How do we communicate with fathers to increase their engagement in home visiting services?
5. What is the expectation for an interaction when a family calls the agency? What is the response time? What is the process when a family has a concern or complaint? Is there an agency process or procedure and do all staff know the process?



PROGRAM PLANNING & SERVICE SYSTEM DESIGN



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PROGRAM PLANNING AND SERVICE SYSTEM DESIGN

The effective delivery of services grows out of strong systems. **HV Standard 6 Program Management Systems describes systems for planning, record keeping, reporting, communication, program level self-assessment, ongoing monitoring, caseload size, and caseload size management.**

It is important to use the New Mexico Home Visiting Accountability Act, the New Mexico Home Visiting Standards, and the New Mexico Home Visiting Long-Term Outcomes to guide the development of program planning and the service system design as the base to build systems that support services.



- A. According to the New Mexico Home Visiting Accountability Act, “home visiting” means a program strategy that delivers a variety of informational, educational, developmental, referral, and other support services for eligible families who are expecting or who have children who have not yet entered kindergarten, and that is designed to promote child well-being and prevent adverse childhood experiences. Part of this definition from the NM ECECD Home Visiting Standards includes “comprehensive home visiting standards that ensure high-quality service delivery and continuous quality improvement.” Therefore, the program standards described in this document are consistent with the requirements set forth by this Act. Services are provided statewide from prenatal to kindergarten entry for pregnant people, expectant parents, and primary caregivers of children as stated in our Home Visiting Accountability Act, NMSA 32A-23B-2.
- B. The Home Visiting Program Standards are based on research and best practices to help create long-term outcomes and program standards. These standards provide a common framework of service delivery and accountability across funded, statewide programs. New Mexico allows the discretion to choose from research-based curriculums and evidence-based home visitation models that best meet the needs of communities and families. The common long-term outcomes and program standards enable the state to establish the following:
- Common performance measures
 - Common data elements
 - Common contractual obligations across all ECECD funded Home Visiting Programs

- C. New Mexico's theoretical framework is founded on six research-based, long-term outcomes identified in the home visiting logic model:
1. Babies are born healthy
 2. Children are nurtured by their parents and caregivers
 3. Children are physically and mentally healthy
 4. Children are ready for school
 5. Children and families are safe
 6. Families are connected to formal and informal support in their communities

QUESTIONS FOR REFLECTION AND DISCUSSION

1. How do I share the Accountability Act, NM HV Standards, and Long-Term Outcomes with staff?
2. How are they used as the foundation to design our program systems?

STRATEGIC PLANNING

According to Harvard Business School, strategic planning is the ongoing organizational process of using available knowledge to document a business's intended direction. This process is used to prioritize efforts, effectively allocate resources, align stakeholders and employees on the organization's goals, and ensure those goals are backed by data and sound reasoning.

Strategic planning is an ongoing process, not a one-time effort. Time and continual reassessment are needed for effective strategic planning. It can keep your program on the right track. **HV Standard 6.2 outlines the ECECD requirement for short and long-term goals for implementing quality services.**

QUESTIONS FOR REFLECTION AND DISCUSSION

1. Does our program have a vision statement that includes home visiting?
2. Does our program have a mission statement that includes home visiting?
3. Does our program have short-term goals or a 5-year plan? How often are these goals reviewed, updated, or closed out as completed? What is the process to identify new goals?

PROGRAM POLICIES AND PROCEDURES

Policies and procedures clarify staff and program expectations. They create a roadmap for daily operations and ensure consistency. **HV Standard 6 discusses the ECECD-required policies and procedures.**

QUESTIONS FOR REFLECTION AND DISCUSSION

1. Do we include all of the required ECECD Home Visiting Policies and Procedures in your current Policy Handbook? How often is this reviewed and updated?
2. How is family engagement, including father engagement, included in our policies and procedures?
3. How are the policies and procedures communicated to our staff and families?

CASELOAD MANAGEMENT

Caseload management is important in order to ensure quality services to families and to support home visitors. **HV Standard 1, Program Participation, and HV Standard 6.8 guide caseload management.**

QUESTIONS FOR REFLECTION AND DISCUSSION

1. What is our process for caseload management?
2. Do we take into consideration the frequency of home visits for families?
3. Do we take into consideration the number of children under five in each family and make informed decisions on the amount of time required to provide quality services to those families?
4. Do we communicate these decisions to the ECECD Manager Monitor?

TIME MANAGEMENT AND ORGANIZATION

Effective time management and organization skills help you to complete your work efficiently and create a work-life balance. Time management and organization skills should be viewed as a self-care strategy. When unfinished work is on your mind during your family or personal time, it may impact your ability to be fully present. When you are behind on data entry or paperwork, it can be overwhelming. There are many strategies for time management and organization. Here are a few:

- A. Prioritize your tasks. By making a task list you can see what you need to do and in what order. Your list should include **must-do, should-do, and nice to-do items.**
- B. Follow a schedule, such as having certain times of the day to look at emails, return phone calls, and do data entry.
- C. Have the needed tools to complete your tasks, such as your computer, access to the internet, your calendar, and the understanding of the systems you need to use.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. How do I set priorities?
2. Do I have a schedule? What does that look like?
3. Do I have the tools I need? If not, who can help me get the tools or skills I need to complete my tasks?

COMMUNITY PARTNERSHIPS

Community partnerships help to identify common goals, align resources, and share data that benefit early childhood services and family well-being in the community. **HV Standard 8.3 discusses the ECECD requirement for participation with a community advisory committee, council, or coalition.**

QUESTIONS FOR REFLECTION AND DISCUSSION

1. Do we have partnership agreements or Interagency Agreements with any of our community partners?
2. How do we identify the community partnerships that align with our goals and services?



ONGOING MONITORING & CONTINUOUS QUALITY IMPROVEMENT SYSTEMS



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ONGOING MONITORING AND CONTINUOUS QUALITY IMPROVEMENT SYSTEMS

Continual monitoring operates on multiple levels to achieve the objective of securing quality data and services. Establishing an effective system and schedule is imperative to accommodate the needs of individuals, home visitors, the program itself, and adherence to standards set by ECECD. By scrutinizing data through ongoing monitoring, program managers can make well-informed decisions and enhance the quality of services. This ongoing process also permits the identification of trends and the prompt correction of issues, contributing to an environment that prioritizes continuous improvement and compliance.

REPORTS

Reports help to organize and manage the daily operations of the program. ECECD-required reports include quarterly reports, recruitment and retention plans, line item budget reviews, and invoicing reports. **HV Standard 6.5 and 6.11.a describe these reports as well as the Program's Scope of Work (SOW).**

RECORDKEEPING

Recordkeeping is important to find the information you need as well as promoting collaboration. ECECD provides an electronic data management system for client files and documentation of required management elements. **HV Standard 6.3 Recordkeeping – Client Records describe the ECECD requirements.**

ONGOING MONITORING

Ongoing monitoring happens at many levels. Quality data and services is the goal and creating a system and schedule that works for you, your home visitors, your program and ECECD helps to ensure program compliance. Analyzing data through ongoing monitoring supports making informed decisions and improved quality services. Ongoing monitoring also allows programs to identify trends, honor success, and correct issues. **HV Standards 6.11 and 6.12 address ongoing monitoring and program response to findings of non-compliance and program deficiencies.**

ADMINISTRATIVE AND FIELD SUPERVISION

Supervision ensures that home visitors are supported in integrating and implementing training information and helps to build skills and competence. **HV Standards 7.5 and 7.5i address supervision requirements. Field supervision ensures that the home visitor**

is supported in implementing the curriculum and that there is continuity in service delivery in the home visiting program. HV Standard 7.5.b Field Supervision describes the requirement.

CONTINUOUS QUALITY IMPROVEMENT (CQI)

Home Visiting programs together with each individual home visiting program manager and their staff, ECECD Manager, UNM ECSC Data Team, and UNM CDD Home Visiting Consultants meet quarterly for a structured process of data review, data-informed goal setting, implementing supports, and measuring results known as CQI. Quarterly data reports are available in the data management system, CQI Quarterly Reports are developed by ECECD and include Program Capacity, Onda Goals, CQI Goals, and Reflection and Implementation Plan Questions.

- A. CQI Quarterly Meetings are scheduled by the ECSC Data Team via Zoom and attendance is required.
- B. Goals are developed in collaboration with the HV Support Team. Onda Goals are related to the qualitative side of the CQI process and CQI Goals are data-informed goals for quarterly performance improvement. The data and consultation team ensure that data, training, and other supports are in place for achieving that goal.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. How do I ensure reports and recordkeeping processes are shared with staff?
2. How do I support home visitors in understanding how data impacts the work and the funding?
3. What is my ongoing monitoring system? Does staff know this system?
4. How do staff monitor their own work and identify what still needs to be completed?
5. How do I create a culture that understands the importance of continuous quality improvement?



TRAINING & PROFESSIONAL DEVELOPMENT SYSTEMS



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TRAINING AND PROFESSIONAL DEVELOPMENT SYSTEMS

Ongoing professional development and training are instrumental in building staff confidence and competence. Efforts not only benefit individual staff members but also contribute to a positive and dynamic organizational culture. ECECD supports the professional development of home visiting staff by providing opportunities through the UNM CDD Consultants and the UNM ECSC Data Team. **HV Standard 7.4 Ongoing Professional Development describes these requirements.**

NEW HOME VISITOR ONBOARDING PROCESS

ECECD Home Visiting has several supports in place to facilitate the onboarding process for new home visitors. A smooth onboarding experience is crucial for ensuring that new hires can quickly and effectively contribute to their roles.

- A. Welcome Packet** – The UNM CDD Consultant Team developed a Welcome Packet for new home visitors and includes: The ECECD Home Visiting Approach; Applying the Parallel Process, Orienting families to the NM ECECD Home Visiting Program, System of Professional Development for NM Home Visiting Programs, CDD Strategies to Support Professional Development for Home Visitors, Home Visitor Learning Path, and In-Service Professional Development Opportunities, and Resources.
- B. Online Training (Required for New Program Managers)** – UNM CDD offers multiple professional development opportunities through online training, providing practitioners with flexibility, accessibility, and the ability to learn at their own pace and around their schedule. Information on the various training is also listed in the Welcome Packet. **HV Standards 7.4.b describes this requirement.**
- C. HV Interactive Orientation** - Cohorts of new home visitors and program managers are provided with a foundational understanding of New Mexico ECECD home visiting by completing online training and interactive sessions facilitated by the UNM CDD Home Visiting Consultation Team. These cohorts have the opportunity to explore and discuss what they have learned in online training, i.e. how to develop relationships with families through conversations, the tools, and screenings as well as observations. Home visitors will develop strategies to engage parents, including fathers, forge networks, and compile resources.
- D. UNM CDD Certificates** – Certificates are issued for professional development offered through UNM CDD’s Learning Stream registration system and the UNM CDD online courses. Each certificate lists the competency areas that were addressed as they relate to the New Mexico Association for Infant Mental Health (NMAIMH) competencies.

Staff print their certificates and the program saves them in the staff personnel files as they may be used for training hours for NMAIMH Endorsement and the required 12 hours of professional development per calendar year. **HV Standard 7.1.d.iii describes this requirement.**

E. Curriculum Training – Home visiting staff must complete training on the selected curriculum or model to ensure fidelity within the first sixty (60) days of hire unless otherwise specified by the curriculum/model fidelity. **HV Standard 5.2 describes this requirement.**

QUESTIONS FOR REFLECTION AND DISCUSSION

1. What is my program's onboarding process?
2. Where are staff training certificates kept?
3. How do I support staff in obtaining their NMAIMH Infant Mental Health Endorsement?
4. How does our curriculum support the parent-child relationship?
5. How do I support staff to engage fathers in home visiting services?

REFLECTIVE PRACTICE

Reflective practice utilizes inquiry and dialogue to reflect on one's experiences and actions that occur during the work. Through reflective practice, individuals learn about themselves and their work to improve their practice and service delivery. Reflection is woven into all aspects of the program. At every level, reflective practice is taught and encouraged. This includes an awareness of personal experiences, challenges, and preferences we bring to any situation in order to approach all encounters with respect, openness, and curiosity. Time for reflection is built into all program activities.

A. Reflective Supervision - Reflective supervision is the process of examining with someone else, the thoughts, feelings, actions, and reactions evoked in the course of our work. It assures quality work, replenishes the reserves needed to do the work, and can reduce stress and burnout. Reflective supervision is a relationship for learning where strengths are supported and vulnerabilities are partnered. This is conducted face-to-face, in a group, or individual supervision of home visiting staff by a supervisor who meets relevant experience in reflective practice. The supervisor promotes the development of skills and responsibility in the delivery of home visiting services. **HV Standard 7.5.a describes this requirement.**

B. Administrative vs. Reflective Supervision – Administrative supervision has to do with compliance, and what you need to do as a program and reflective supervision has to do with the how's and the why's of home visiting. **HV Standard 7.5.c describes this requirement.**

C. Monthly Manager Reflective Supervision Groups - Groups of program managers and/or home visiting supervisors have monthly opportunities to participate in facilitated Reflective Supervision sessions to support their learning and provision of Reflective Supervision to the home visitors in their programs.

QUESTIONS FOR REFLECTION AND DISCUSSION

1. How do I prepare for reflective supervision sessions?
2. Is there a routine or practice that I can or have implemented?

RESOURCE GUIDES

The New Mexico Home Visiting Resource Guide includes the following: home visiting overview, long-term outcomes, home visiting standards, program curriculum, screenings and tools, professional development, infrastructure supports, resources, references, and glossary.

REQUIRED MEETINGS

- A. Biannual Meeting - for program managers and supervisors
- B. Regional Meetings - for all program staff, including home visitors

HOME VISITING TRAINING CALENDAR

Reflective Case Reviews

Reflective Case Review sessions are one-hour-long Zoom opportunities that are offered to all home visitors statewide. These sessions are the venue for the review of difficult cases or celebrations brought to the group by home visitors. The focus is a reflective review of the cases presented.

ASQ

This Instructor-led course explores in depth the Ages and Stages Questionnaires® and how to accurately screen the developmental and social-emotional growth of children between two months to age five. It provides information on how to introduce, interpret, and share the results with Home Visiting families. The training is open to new and tenured home visitors. Training consists of two live Zoom meetings lasting 3.5 hours each.

Mothers and Babies

The Mothers and Babies program is evidence-based and provides useful tools and skills to help pregnant and parenting people manage stress and/or reduce symptoms of depression. The virtual training consists of a series of three live Zoom meetings lasting 3.5 hours each.

Community of Learners

Community of Learners sessions are one hour. These Zoom opportunities are offered for all home visitors. They feature specific topics or sub-groups, e.g., young moms, grandparents raising grandchildren, etc. The sessions host experts from the field and break-out rooms that provide opportunities to share experiences and forge networks.

Podcasts

Podcasts in English and Spanish allow home visitors to listen and learn while they travel. Topics are determined by input from the home visiting community. Each podcast is between 5-30 minutes.

Manager Brown Bag Sessions - Thirty minute Brown Bag Management and Leadership Sessions are held quarterly. The sessions provide an opportunity to meet with peers, develop effective strategies, and access valuable resources

UNM CDD CONSULTATION AND WEBSITE

The Home Visiting project, offers consultation services to home visiting programs and facilitates the professional development of home visitors. The primary goal is to enhance the capabilities of staff directly involved in providing services to families and infants in New Mexico, ultimately contributing to the well-being and success of babies. The Center for Development and Disability's (CDD's) Early Childhood Learning Network (ECLN) manages a team of Home Visiting Consultants, and experts in infant and toddler development. This team delivers consultation and technical assistance to home visiting programs across five regions of New Mexico.

The Home Visiting Consultant Team focuses on core and advanced practice consultations, emphasizing a relationship-based, culturally competent, and reflective approach. Guided by the NMAIMH Competencies for culturally sensitive, relationship-based, and reflective approaches, the consultants hold endorsements from NMAIMH (IMH-E). Home Visiting programs receive support from a lead consultant, supplemented by input from the entire consultant team on at least a monthly basis, and additional assistance is provided based on program needs.

Resources for home visitors and supervisors are also available on a website, including newsletters, tips and resources, videos, recordings from Community of Learners and Home Visiting Meetings, training information, tools, documents, and forms. The website can be accessed at the following link, <https://cdd.health.unm.edu/ecln/home-visiting-training/>

MENTAL HEALTH CONSULTANTS

Program procedures ensure home visitors have access to at least one master's level or higher licensed mental health professional available for consultation when potential high-risk situations, crises, and/or other clinical issues or concerns arise to offer support to the home visiting team. **HV Standard 7.2 describes this requirement.**

to support home visitors and improve agency systems. Experts from the field are guest presenters.

Newsletters - Quarterly newsletters are crafted and circulated to the field, offering insights gleaned from research as well as updates from ECECD. These newsletters serve as a platform for communication, fostering discussions between program managers and home visitors during supervision sessions or staff meetings. The newsletters are conveniently accessible on the CDD home visiting website.

ECSC DATA TEAM TRAINING

Within forty-five (45) days of receiving a fully executed home visiting agreement, the program must be set up in the New Mexico ECECD Home Visiting database. It is the home visiting program's responsibility to work with the ECSC Data Team. New staff must complete the training provided by ECECD in the use of the data management system within 30 days of hire and before service delivery begins. Data management includes data entry, monitoring, reporting, and analysis. **HV Standard 9 describes this requirement.**

QUESTIONS FOR REFLECTION AND DISCUSSION

1. Are the required meetings on my calendar? Do staff have the Regional Meetings on their calendars?
2. Have I visited the UNM CDD Home Visiting Training Calendar web page? Am I familiar with all of the resources on the UNM CDD Website?
3. Do I know who our Mental Health Consultant is? Who in my agency can provide that contact information?
4. Do I know how to contact the ECSC Data Team? Do all of my staff know how to contact the ECSC Data Team when they have a question?

From the information provided, what can you implement in the next 2 weeks?



REFERENCES



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