Section 3: Program Processes

3.1 Canvassing/Marketing/Workshop Requests

Cornell University Cooperative Extension-NYC staff should canvass/market programs on an ongoing basis. Planned canvassing/marketing activities by CUCE-NYC Nutrition and Health staff should be approved by the community educator's immediate supervisor. The goals of the canvassing and marketing efforts are to market the Nutrition and Health programs to the targeted NYC communities, to recruit agency partners, and to help reach the goal of educating families about nutrition and health topics. This is an ongoing program effort.

Canvassing/Marketing Procedures

- Canvassing/marketing CUCE-NYC Nutrition and Health Programs should be ongoing. Planned canvassing/marketing should be conducted prior to each quarter while quarterly schedule is in development or as directed by supervisor.
- CUCE-NYC staff is trained in canvassing/marketing during Navigating for Success (NFS) and as required by supervisor.
- Canvassing/marketing is conducted to reach out to agencies and partners.
- Records of planned canvassing/marketing activities are required.
- Staff should be equipped with:
  - CUCE-NYC Nutrition and Health Marketing Portfolio
  - request forms
  - business cards
- Staff should be attired appropriately (business, business-casual)
- Specific neighborhoods and potential partner agencies should be identified or targeted.
- Follow-up should be recorded using canvassing/marketing form
  (see Attachment 3.a: Canvass Referral Form).
- Canvassing/marketing forms should be submitted to supervisor within 2 days.

Telephone Canvassing/Marketing Procedures

- Telephone marketing /canvassing efforts should be reported and recorded using the Canvassing log *(see Attachment 3.b: Outreach/Recruitment Canvassing Log).*
- Canvassing logs for telephone canvassing should be shared and discussed with program supervisors regularly.
- Follow up should be recorded and outcomes detailed on the canvassing log.

3.2 Quarterly Scheduling Policy

Staff scheduling is a crucial part of program management and is important for planning, meeting program goals and expectations, and maximizing staff time and effort. Programs must be able to schedule staff in a manner that allows them to balance their job responsibility effectively while meeting the program goals and expectations.

Cornell University Cooperative Extension-NYC Nutrition and Health Community Educators staff must plan and schedule their program activities quarterly. These schedules will provide the information needed to document their work time and efforts and allow supervisors the opportunity to provide needed support and guidance.

Quarterly Scheduling Process

- All Nutrition and Health program community educators must complete a quarterly schedule of their workshops series.
  The first draft of the quarterly schedule is due to supervisors on the following dates:
  > Quarter 1…due September 15th
  > Quarter 2…due January 15th
  > Quarter 3…due April 15th
  > Quarter 4…due July 15th
- Schedule changes should be reported as soon as they occur and updated versions of the schedule provided to the supervisor and/or office manager/administrative assistant.

Quarterly schedules must include the following information:

- Community Educator's Name
- Quarter (Date and Term)
- ESNY, EFNEP, or other program assignment
- Start and End time for each day
- Site Name/Address/Phone Number/Fax Number
- Contact Name/Contact Title
- Time allocated for Lunch, Travel, Set-up, and Food Shopping
- Start Date, End Date, Start Time, and End Time of workshop
- Adult/Senior or Youth
- Time allocated for documentation, planning, and reporting
- Summary of the number of groups for the quarter (adult, youth, senior)
  (see Attachment 3.c: Quarterly Schedule Template)

3.3 Handling Confidential Participant Records

Participants enrolled through the Food and Nutrition Education in Communities programs (such as EFNEP and ESNY) are asked to provide personal identifying information about themselves and their family. These data are key to the successful evaluation of the program. Cornell University Cooperative Extension–NYC program staff and volunteers must understand the importance of maintaining the confidentiality of this information and demonstrate a commitment to the processes and policies which protect program participant confidential data.

Once participant data are collected, the information must be handled confidentially with access limited to people, including staff, approved for such access.

Cornell's Responsibility:

- Provide all community educators with locks for bags/travel cases which transport and store confidential participant records while travelling to and from agency sites and CUCE site offices.
- Provide an easily accessible "general" locked storage cabinet at the CUCE site offices to store confidential records when they are returned to the site offices. This storage location will be available and accessible to all approved nutrition program staff.

Nutrition and Health Staff Responsibility:

- All confidential records (WebNEERS Entry and Exit forms) must be transported at all times in locked travel bags/cases.
- Upon completion of the data collection from program participants, the confidential participant records must be taken to and stored in at the local site offices the first time the community educator returns to that site office.
  - All subsequent work on the participant records, including food recall coding, must be conducted in the site office.
  - All records will be secured in the locked storage cabinets when the community educator is not specifically working on those records.
  - These confidential records must remain at the local site office at all times.
- All participant data records will be stored in the designated secure storage in the site offices.
- All confidential participants records submitted for data entry must be stored in secure storage until they are entered and then returned to the designated "general" storage unit.

Completed records of graduated/terminated participants will be filed and stored in locked storage units until the end of the program year, where they can be available for review.