

## Required Observations & File Reviews: Local Agencies

- Refer to [Policy & Procedure Manual](#) on the ITCA website for clarification
- Forms can be found on the [Useful Documents](#) tab
- *Observations and file reviews can be used to fulfill multiple evaluation requirements.* For example, all of the observations and file reviews from the performance evaluations can also be used for self-assessment.

Evaluation Name	Where to find in P&P Manual	Frequency	Due Date	By whom?	Evaluation Type Included	# of observations per staff	#of file reviews
Quality Assurance	Section Two: Chapter Two: Client Education	Twice a year	Dec. 31 <sup>st</sup>	RD or LA Director	Observations	2 - nutrition educations per year	N/A
Performance evaluations	Section Two, Chapter Thirteen: Staff Management	Every year	One year from prior year's evaluation or Dec. 31 <sup>st</sup>	LA Director RD: NE observation	Job duties, observations, & file reviews	3- nutrition educations 3- certifications 2- breast feeding (for PG or BF moms)  -From different client categories	Min- 5 file reviews (1 per client category)
Self-Assessment	Section Two, Chapter Nine: Monitoring	Alternate year of on-site monitoring visit	Before TA visit or by June 30th	LA Director RD: NE observation	Observations; file reviews; financial review	3- nutrition education 3- certifications 2- breastfeeding  -From different client categories  1-Fit WIC and 1- non-Fit WIC group <i>if applicable</i>	Based on case load. - Refer to Local Agency Self-Evaluation checklist
Staff Competency Evaluation	Section Two, Chapter Thirteen: Staff Management	Within six months of hire	variable	LA Director RD: NE observation	Job duties, observations, & file reviews	5- nutrition educations 3- certifications 2-breastfeeding (for PG or BF moms)  -From different client categories	Min- 5 file reviews (1 per client category)