



Strengthening Home Visitor Safety: Applying Process Maps and Decision Trees

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Introduction

Home visitors carry out essential, relationship-driven work, entering homes and community environments that sometimes involve physical, emotional, and professional risks. Home visiting agencies play a critical role in ensuring that home visitors have the training, supervision, resources, and procedures needed to carry out their role effectively, confidently, and safely.



Process maps are visual tools that make safety-related policies, procedures, and protocols easier to understand, communicate, and implement. One type of process map is the decision tree. Decision trees visually guide users through a series of decisions, actions, and potential outcomes, helping them apply policies and procedures consistently.

This resource is designed to help home visitors, supervisors, and organizational leaders use process maps and decision trees to strengthen safety both within the organization and during home visits. By collaboratively developing and regularly reviewing clear, actionable decision trees, organizations can promote consistent decision-making and reinforce a culture of safety. In turn, home visitors are better equipped to navigate challenging situations with confidence, feel supported in their work, and sustain high-quality services for families over time.



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This resource advances the National Strategy for the Home Visiting Workforce's vision for a sustainable, skilled workforce by providing practical, everyday strategies to support workforce well-being.



This Resource Includes:

- Information on how process maps and decision trees support home visitor safety.
- One example process map and one example decision trees that map out two safety-related topics: animals in the home and disclosure of intimate partner violence. These can serve as models for mapping other safety-related processes, such as preparing for weather events.
- Steps and resources to support home visiting teams in developing their own decision trees.

The guidance shared here complements the discussion guide "[*Supporting Home Visitor Safety in the Organization and Out in the Field*](#)" by offering example process mapping tools that clarify the process and steps in decision-tree development.

How can process maps and decision trees enhance home visitor safety?

There are several important ways that process maps and decision trees can help home visiting staff enhance home visitor safety. They:

- **Visually represent safety-related policies, procedures, and protocols**, making them easier to understand and apply. They help home visitors move from broad expectations to concrete, actionable steps that strengthen both physical and psychological safety.
- **Support real-time decision-making** by offering structured "if/then" pathways ("trees") that guide home visitors in assessing risk and choosing appropriate actions. This strengthens both physical safety (through guided responses) and psychological safety (by reducing the burden of navigating difficult situations alone).



- **Clarify roles and responsibilities at each step of a process.** This reduces uncertainty, supports consistent decision-making, and helps home visitors feel more confident and prepared in their work.
- **Promote a shared understanding and a culture of safety.** This is especially true when staff collaborate to develop or refine them. This collective process builds trust, increases buy-in, and reinforces consistent safety practices across the program.
- **Often reveal gaps or inconsistencies in current workflows.** This helps programs strengthen their safety systems and create more consistent and reliable guidance for home visitors.
- **Simplify processes by highlighting unnecessary or redundant steps.** Streamlined processes reduce staff burden and support safer, more effective practice—especially during stressful situations.

By using process maps and decision trees, home visitors, supervisors, and organizations can clarify roles, promote consistent decision-making, strengthen shared accountability, and make home visitor safety an intentional, organization-wide practice.

Below are two examples of a process map and decision tree. Home visiting teams can use or adapt these templates to meet their organization's needs. Step-by-step guidance for creating customized decision trees follows the examples.



Example 1: Animal Safety Process Map

This process map is designed to help home visiting staff clarify the expectations, decision-making process, considerations, and action steps they or their organization should take to ensure their safety when an animal is present during a home visit.

Animal Safety Process Map	
Purpose	• Reduce anxiety and address/support potential secondary trauma related to animal attacks
Decision-making Process	• Review and approve animal safety decisions using your agency's established process. • Follow your agency's animal safety policies and procedures • Home visitors have the responsibility and authority to cancel, postpone, relocate, or end a visit if an animal creates a safety concern. • Discuss any animal-related concerns or near misses with your supervisor before the next visit. • Report all animal-related incidents to your supervisor immediately after the visit. • Organizational policies should clearly define which animal-related situations require reporting to a supervisor, animal control, or law enforcement. • If unsure how to respond or report an animal-related situation, consult your supervisor.



Visit Environment/ Safety	Prompt	Yes	No
	Are there animals present in the household?		
	Is the animal known to be aggressive? Has an incident occurred in the past?		
	Is the family able to remove the animal from the home visit room/location?		
	Is the family able to cage/contain or leash the animal?		
	Are there other animal hazards to be aware of outside of the home (e.g., loose neighborhood dogs)?		
	Does the home visitor have an allergy to the animals present in the home?		
	Does the home visitor fear the animals present in the home?		
	<i>Other?</i>		
What to Do Prior to the Home Visit	• Discuss potential dangers with your supervisor and make a safety plan. • Make sure your organization knows your schedule and where you will be. • Keep your phone charged and programmed with emergency numbers including your supervisor, police, and animal control. • Review family history and intake information to screen for possible animal safety concerns; note if there are animals on the intake form. • Call ahead and explain that animals will need to be kept out of the home visit room. Ask if there are any challenges to doing this.		

What to Do During the Home Visit	• Look and listen to identify possible indicators of risk (see next section on “Risk”) • Call out or whistle to determine if there are any loose dogs in the yard before opening the gate. If loose dogs are present, contact the family and consider rescheduling the visit. • Do not touch or pet animals.		
Risk	High Risk Indicators	Potential Risk Indicators	
	• Aggressive or threatening animal behavior (from home or neighborhood) • Unknown animal(s) are present outside the home and home visitor is unable to contact the homeowner • Family is unwilling/unable to remove animal(s) from home visit area • Home visitor has unwanted contact and/or is bitten	• Signs that indicate the presence of an animal (e.g., food or water dish in home, worn animal path around the yard) • Home visitor feels uncomfortable with animal presence. • Home visitor is allergic to animals	
	If any indicators are present (YES):	No	
	Do not proceed with home visit. Follow safety protocol.	Proceed as planned, but continue to assess potential risks at each visit and note any new concerns.	
		If any indicators are present (YES):	Proceed with caution. Consult supervisor or cancel visit, if necessary.

Next Steps	For the Home Visitor • Leave the premises safely and quickly. Face the dog and back away slowly (do not run). • If injured, seek immediate medical attention. • Inform supervisor and debrief. • Reschedule visit once back at the office. • Record details about the animal in the family's file to alert future home visitors. • Complete incident form if bitten or hurt. For the Organization • Assist with immediate and ongoing medical and legal needs resulting from the incident. • Debrief with staff and witnesses, and complete an incident report according to agency policy. • Report incident to animal control and law enforcement. File criminal charges and address home visiting clients, as appropriate.	For the Home Visitor • Talk with family about removing or securing animal(s) for next visit. • Debrief with supervisor during supervision. • Incorporate discussions of safety into reflective supervision. • Record details about the animal in the family's file to alert future home visitors. For the Organization • Bring home visitor safety concerns to agency management.
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**Supervisory
and
Organizational
Considerations**

Supervisory Considerations

- What should you do if a home visitor shares or reports allergies to certain animals?
 - Ensure that supervisors or staff responsible for caseload assignments are aware of home visitors with pet allergies and can assign visits appropriately.
- What should you do if a home visitor shares or reports a fear of certain animals?
 - Ensure that supervisors or staff responsible for caseload assignments are aware of home visitors with animal phobias and can assign visits appropriately.
- What should you do if a home visitor is injured by an animal during a home visit?
 - Ensure the home visitor receives appropriate medical attention, follow agency incident reporting procedures, and review the event to identify any needed changes to future safety planning.

Organizational Considerations

- How can the organization create a supportive environment where home visitors feel comfortable discussing their safety needs?
 - Promote open communication through regular supervision and team meetings. Create a work culture where home visitors feel comfortable sharing safety concerns and needs (e.g., allergies, medical conditions, comfort levels around animals) voluntarily and without judgement, ensuring that all information remains confidential and supports staff well-being.
- How can the organization promote ongoing animal safety awareness?
 - Add animal safety as part of broader safety discussions during staff meetings and reflective supervision.

Resources

Healthy Pets, Healthy People (Centers for Disease Control and Prevention). Provides guidance on preventing injuries and illnesses from contact with pets and other animals, emphasizing safe interactions, hygiene, and awareness to protect home visitors. Includes specific safety guides related to dogs, cats, and other common animals found in homes.

Home Visitor Safety: Self-Assessment (Institute for Home Visiting Workforce Development). Provides definitions and examples of home visitor physical and psychological safety as well as self-assessments and reflection questions.

Organizational Home Visitor Safety Checklist (Institute for Home Visiting Workforce Development). Supports home visiting organizations in identifying and reinforcing policies and practices that uphold a safe, confident, and well-supported home visiting workforce.

Add your own agency-approved, required resources and training videos to reinforce animal safety practices and support staff learning.

Example 2: Intimate Partner Violence Safety and Readiness

Case Scenario and Decision Tree

This case study and decision tree are designed to help home visiting staff and organizations prepare for and respond to a situation in which intimate partner violence (IPV) is disclosed or suspected during a home visit. The decision tree is intended to support—not replace—professional judgment by helping home visitors, supervisors, and organizational leaders clarify roles, assess safety, and determine appropriate next steps.

The decision tree is organized into three sections (called “swim lanes”)—home visitor, supervisor, and organization—so each role can clearly see its responsibilities and how decisions at one level influence actions at the others. Together, the swim lanes support coordinated decision-making and shared accountability across the program.

Use the case scenario, high-risk safety indicators, and decision tree together during staff training, reflective supervision, safety planning, or policy review. Begin by reviewing the case scenario and high-risk safety indicators. Then, work through the decision tree, discussing each decision point, the actions for each role, and how those actions align with your organization's policies and procedures. Use the discussion to identify gaps, clarify expectations, strengthen safety planning, and adapt the decision tree to reflect your program's policies, community resources, and reporting requirements.

The decision tree supports home visitors, supervisors, and organizational leaders to:

Home Visitors	Supervisors	Organizational Leads
• Reflect on their own comfort, readiness, and safety when IPV is disclosed.	• Guide supervision conversations about IPV safety planning and readiness.	• Identify gaps in IPV-related policies, procedures, and/or training.

Home Visitors	Supervisors	Organizational Leads
• Clarify when to seek supervisory support related to IPV safety concerns. • Share feedback that informs organizational IPV safety improvements.	• Support staff in making decisions about IPV-related comfort and safety. • Escalate IPV safety concerns and share organizational gaps with leadership.	• Ensure consistency of IPV safety policies, procedures, and communications. • Create feedback loops with supervisors and home visitors to strengthen IPV safety practices.

Before using the decision tree, review the potential high-risk safety indicators below. These indicators can inform decision-making at key points in the process and should always be considered alongside your organization's policies and professional judgment.

Potential High Risk Safety Indicators for IPV Include

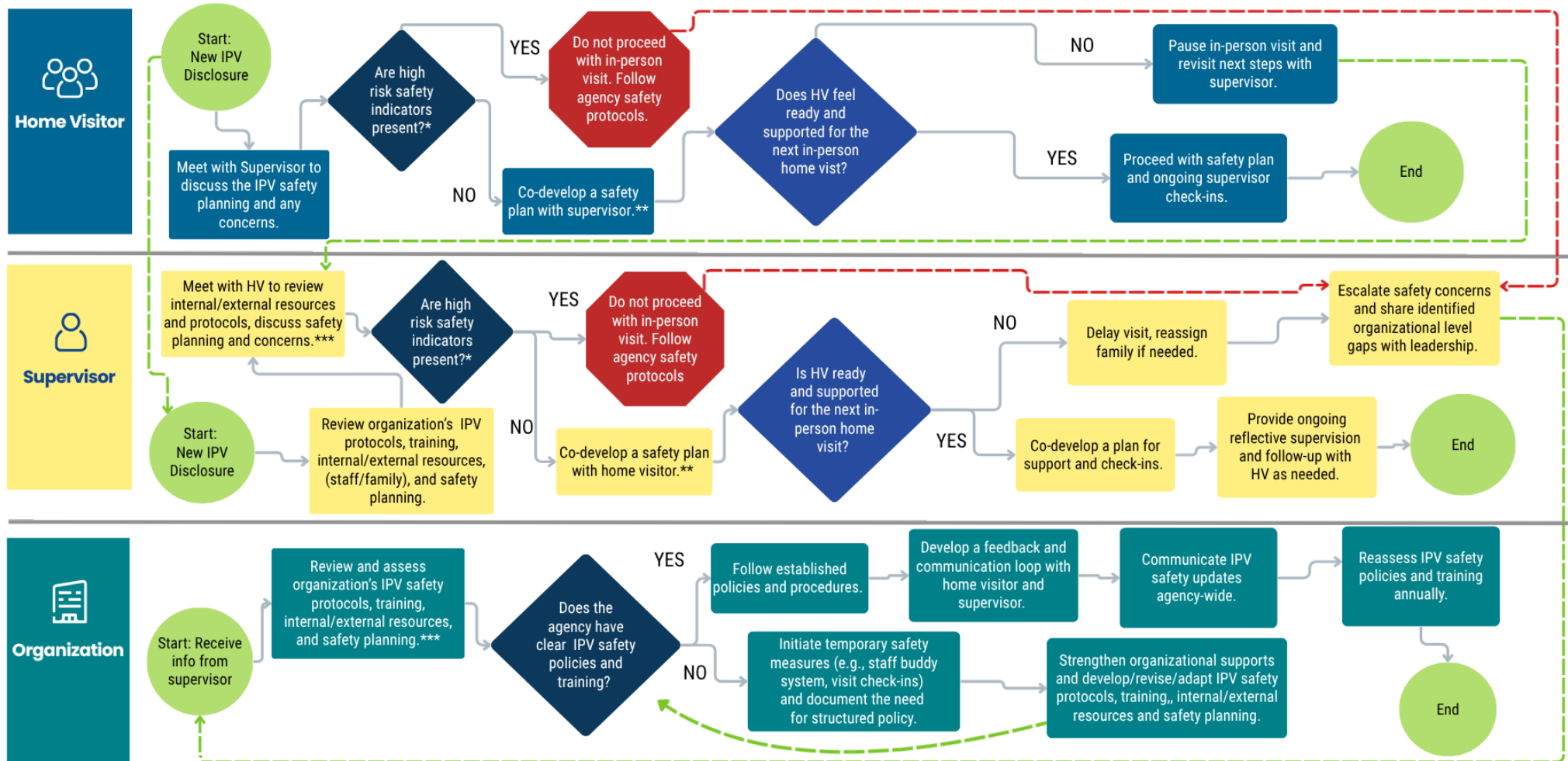
- Violence is known to have recently occurred and the perpetrator is at the address or likely to arrive during the visit.
- Violence was directed towards the home visitor.
- A threat was made against the home visitor.
- Someone in the home communicates that the home visitor is not welcome in the home.
- There is the presence of a weapon.
- The home visitor is unable to leave freely.



Case Scenario: Marisol's Story

Marisol is a home visitor for a Tribal MIECHV program. She has three years of experience supporting families in both rural and suburban areas. She was recently assigned a new family. After a few visits, she learned that there is IPV occurring in the home. Marisol herself has experienced IPV and is not sure if she feels comfortable proceeding with the home visits.

Intimate Partner Violence Safety and Readiness Decision Tree



Creating Your Own Decision Tree Process Map

Creating a process map or decision tree is a collaborative activity that helps home visiting teams clarify roles, expectations, and safety procedures. Bringing together home visitors, supervisors, and program leaders to map real-world practices can uncover gaps, improve consistency, and strengthen shared decision-making. The steps below provide a simple process your team can use to develop or refine a decision tree that reflects your program's policies, workflow, and unique safety needs.

1. Identify the process you want to map.

The team (including home visitors, supervisors, and program leaders) begins by choosing a specific safety-related process to visualize—for example, preparing for a home visit, responding to safety concerns during a visit (such as an aggressive animal), communicating safety incidents to supervisors, or planning for situations such as severe weather events.

2. Gather the people who know the process best.

Home visitors, supervisors, and program leaders come together to share how the process actually happens in daily practice. Including multiple perspectives helps ensure that the map reflects real experiences, not just written procedures.

3. List the major steps in the process.

The team identifies the key actions involved. For example, in preparing for a home visit, the steps might include reviewing case history, assessing potential risks, checking in with a supervisor, and verifying that safety protocols are in place.

4. Break the steps down into smaller, detailed actions.

Each step is expanded into clearer, more specific tasks—such as “review recent notes,” “check if concerns were raised in prior visits,” and “reviews the safety plan for entering and exiting the home.”

5. Put the steps in logical order.

The team arranges the actions chronologically, showing how one step flows into the next. This creates a sequence from the start of the process to the end.



6. Add decision points.

The team identifies choices—such as “Is there a potential safety risk?” Every decision leads to different pathways (e.g., “If yes, consult a supervisor before the visit”; “If no, proceed with the visit as planned”).

7. Draw the map using simple symbols.

The team places steps in boxes and decisions in diamonds, and uses arrows to show how one step flows to the next. The visual layout helps staff easily see the entire process from beginning to end.

8. Review the map with staff and test it against real scenarios.

Home visitors and supervisors walk through the map using examples from practice to check for gaps, unclear steps, or places where staff currently follow different procedures.

9. Revise the map to improve clarity and consistency.

Over time, the team collects feedback on the map and adjusts it, as needed—adding missing steps, simplifying complex areas, or aligning decisions more closely with program policies.

10. Use and share the map to support safety.

Once completed, the process map becomes a practical tool for training, supervision, communication, and consistent decision-making—helping home visitors feel safer, more supported, and more confident in their work. It is introduced during an initial training and then reviewed annually.



Resources

For creating your own decision tree or process map

[Continuous Quality Improvement Toolkit: A Resources for Maternal, Infant, and Early Childhood Home Visiting Program Awardees. Module 6: Process Maps](#) (Design Options for Home Visiting Evaluation). Describes the purpose of a process map, when to use a process map, and how to develop one.

[Quality Improvement Essentials Toolkit](#) (Institute for Healthcare Improvement). Includes a tool on how to create a flowchart (another name for process map) and simple template. Enter your name and email to download.

For supporting home visitor safety

[Home Visitor Safety](#) (igrow Illinois). Explores best practices in safety, and safety policies and trainings for home visitors, home visiting supervisors, and home visiting agencies. Includes a template for developing a safety policy.

[Home Visitor Safety Guide](#) (Oregon Health Authority). Provides information on how home visitors can keep safe before, during, and after home visits. Also includes a Home Visitor Safety Guide Checklist.

[Home Visitation Safety Manual](#) (Oklahoma Home Visitation Leadership Advisory Coalition). Includes general safety guidelines as well as guidelines for special circumstances.

[Institute for the Advancement of Family Support Professionals](#). Provides the following professional development training in English and Spanish: Practicing Personal Safety while Partnering with Families, Family Partnerships that Support Change and Healing, and Personal Safety for Supervisors.

