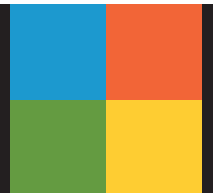


# THE ESSENTIAL PACKAGE



**Implementation Guide for Program Managers**



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# Overview

**After the Essential Package Foundation Training**, both the program staff as well as the home-based care volunteers will need continuous mentoring and coaching in order to utilize the package tools to help caregivers better address their own and their child's essential needs. This guide provides an overview of how program staff will mentor the volunteers and document the successes and challenges at the caregiver and volunteer levels as well as how the program managers will analyze the information collected from the field and mentor their staff to effectively build the volunteers' capacity.

## List of Tools Referenced in Guide

### For Home-based Care (HBC) Volunteers

Per Visit Assessment Tool

Visual Reference Guide

### For Program Staff

Home Visit Monitoring Tool                      Annex A)

Reflection Meeting Reporting Tool              (Annex B)

Notes for Reflection Meeting Facilitator      (Annex C)

Sample Reflection Meeting Guide              (Annex D)

## I. Program Staff Responsibilities

### A. Mentoring Home Visits with Volunteers and Feedback Session

- 1. Timing:** At first, the staff should plan more intensive monitoring, optimally at least twice a month with each volunteer to two different households, up to three times a month if there are fewer volunteers. It is important that the staff prepare for their mentoring visits by reviewing the visual reference guide and per-visit tool because staff will not be using the tools everyday as the volunteers do in their home visits.
- 2. Instrument:** Home Visit Monitoring Tool (Annex A),
- 3. Description of Visit:** At the beginning of the first visit to each household, the staff member should introduce him/herself and explain that he/she is there to: learn about how the caregiver is caring for their needs and their children's needs and how he/she can help the volunteer to use the tools. It is important to not appear as a supervisor to ensure that the volunteer and caregiver feel comfortable to share their questions and concerns with each other. The staff member should fill in his/her monitoring tool during the visit so that he/she can utilize it to guide the feedback session with the volunteer.

**4. Feedback Session:** After the monitoring visit, the staff member will hold a feedback session with the volunteer. At the beginning of the first feedback session, the staff member should create a positive environment so that the volunteer feels at ease to ask questions and share his/her experiences and challenges. He/she should explain that the purpose of the monitoring visits is to observe how the volunteer is able to use the tools to interact with the caregiver and share important messages about services and positive caregiving practices. The staff member should stress that his/her role is to mentor and not to supervise. The staff member should then share the mentoring tool with the volunteer to explain what kind of notes he/she was taking during the home visit.

On subsequent visits, the meeting can begin immediately with the feedback session. The volunteer will first answer each question and then the staff member will give his/her constructive feedback using evidence from the visit as examples. Staff should use the second part of the monitoring tool to guide the session. In this format, the volunteer first shares successes and receives positive feedback and afterwards reflects upon and receives constructive feedback to address challenges. The staff member should frame their feedback in the following way:

BITs	Description	Example
Behavior:	The action that you see	"I liked the way you followed up on the last visit to make sure that the sick child went to the health clinic."
Impact:	Why it is important	"This is very important to ensure that children in the household receive medical attention when they are ill."
Time:	What you would like to see in the future	"Please continue this excellent practice and always follow-up on your recommendations and referrals."

This is called the B.I.T.s approach<sup>1</sup> and it will assist staff members in highlighting the importance of the volunteers' actions to provide both positive and constructive feedback. At the end of the session, the staff member should always take the opportunity to motivate the volunteer by praising their dedication and good work in helping others in the community.

## B. Facilitation of Reflection Meeting Sessions Among Volunteers

- 1. Timing:** As the volunteers have many other activities, the staff member should consult them for a time that is convenient for everyone to meet. The ideal time for the reflection meetings are either at the beginning or end of each month.
- 2. Instruments:** Reflection Meeting Reporting Tool, Notes for Facilitator and Reflection Meeting Sample Guide (Annexes B, C, D)
- 3. Description:** At the meeting, the staff member will use the guide and the reflection meeting reporting tool to document volunteer feedback. This tool should be completed immediately following the meeting so that the program can capture the progress and challenges that the volunteers have

<sup>1</sup> Adapted from the BET approach, Save the Children.

shared. This meeting will be described in greater detail in the program manager section below.

### **C. Turn in Completed Monitoring tools to Program Manager in a Timely Manner**

The program manager should develop clear deadlines for the program staff to turn in the reflection meeting and monitoring visit tools. These tools give insight to the positive changes and challenges at the caregiver and volunteer levels and should be used to address the volunteers' capacity building needs. Please see the program manager section below for more information.

### **D. Participation in Monthly Planning Meetings among Program Staff**

These meetings provide an opportunity for staff members to reflect on their work with the volunteers over the last month, the successes and challenges at the caregiver, volunteer and program staff level. Staff members should prepare for these meetings by reflecting on:

- Their activities and highlighting the changes they have seen in their work, the volunteer's work and the caregiver practices; and
- Areas where they and the volunteers need more guidance and challenges for caregivers in meeting their children's needs.

This meeting will be described in greater detail in the program manager responsibilities section below.

## **II. Program Manager Activities and Responsibilities**

The program manager has a critical role in building the capacity of his or her team to mentor and document the volunteer's activities. At the office, the program manager does this by holding a monthly meeting to prepare for the reflection meetings with volunteers as well as a planning meeting that reflects on the field activities to incorporate lessons learned into the following month's activities. In the field, the program manager should monitor the activities of each staff member to ensure that they have the necessary skills to effectively mentor the home based care volunteers. Analyze the information collected in the two staff tools to reevaluate the staff and volunteers' capacity building needs.

### **A. Preparation for First Monitoring Home Visits with Volunteers**

1. **Timing:** Before the staff begins monitoring visits
2. **Instruments:** Home Visit Monitoring Tool, Per Visit Assessment Tool, Visual Reference Guide
3. **Description:** The program manager should hold a preparation session to build staff capacity to implement the monitoring tool, effectively observe the volunteers and hold a feedback session. This session should include the following components:
  - **Monitoring Visit Overview:** Program manager describes what the staff will do during the monitoring visit (Observe, fill out tool, carry out feedback session) using the description in the

Staff Responsibilities section above.

- **Review monitoring tool:** The program team reviews each question in the program tool and practices how to provide specific examples in the Evidence column. The team should also discuss the importance of the tool in documenting what is happening in the home. The program manager should explain how he/she will use the information collected to improve the quality of the tools and develop strategies to address challenges that will be shared in the reflection and monthly planning meetings.
- **Review volunteer's tasks and staff's actions during visit:** Discuss the volunteer's role during a home visit as it was practiced in the Essential Package Foundation Training. What are the tools that he/she will use? How should the volunteer interact with the caregiver and share messages? Highlight the importance of observing the caregiving environment with a critical eye to see areas to address that the volunteer may not see. Next, discuss the role of the staff during the monitoring visit. How will she/he observe the visit in a way that will not make the volunteer or caregiver uncomfortable? How will the staff member guide the volunteer if she/he is having difficulty using the tool? As a group, simulate the right way as well as the wrong way and discuss. It is important that the staff member's presence not undermine the volunteer's authority as a mentor for the caregiver.
- **Practice feedback session:** Staff should prepare a mini-script about how they will introduce themselves and explain the purpose of these visits. The team should role play the feedback session while using the monitoring tool as a guide. They should practice using the B.I.T.s. approach to share positive as well as constructive feedback.

## **B. Preparation for Reflection Meeting with Volunteers**

The reflection session provides an opportunity for the volunteers to share their successes and challenges as professionals as well as the changes and challenges that they find in their interactions with the caregivers at the household level. It is important that the staff prepare for these meetings so that the sessions are dynamic and useful for the volunteers' in their roles as home based care mentors. A sample guide can be found in Annex D. The program manager should utilize this guide to finalize the activities and simulate the meeting with his/her team before each meeting with the volunteers. The following section provides more guidance on which sections of the meeting will change each month and how the team can prepare to promote problem-solving and peer-to-peer learning among the volunteers.

### Activity 1: Greetings

The team should practice a song or game to start the meeting in case the volunteers do not have their own example.

### Activity 2: Reflection

During each reflection session, follow up on the challenges from the last session to find out if it was possible to overcome this challenge from the previous month. If there is a challenge for which the volunteers are unable to develop a strategy, the staff member should highlight this in the reflection meeting reporting tool so that the program manager and staff can strategize as a team.

### Activity 3: Practice with the Volunteer Tools

This activity will change each month depending on the volunteer needs. At first, ask which parts of the tools are causing difficulty. Use the feedback from the monitoring tools to anticipate which parts of the tools are more difficult than others and practice them as a team during the preparation meeting. Once the volunteers feel more comfortable with the tools, the team can review the activities on two visual reference cards at each session.

### Activity 4: Closing

Highlight the importance of the volunteers in each community to plan time to come together and reflect on their experiences each month in addition to the reflection meeting. This practice will not only facilitate peer-to-peer learning for the sustainability of these activities but will improve the quality of the volunteers' interactions with caregivers.

## C. Analysis of Successes and Challenges

1. **Timing:** Before and during the monthly planning meeting
2. **Instruments:** Home Visit Monitoring Tool and Reflection Meeting Reporting Tool
3. **Approach:** The home based care monitoring visit tool; reflection meeting reporting tools; and staff reflections at the monthly planning meeting provide rich information about how the volunteers are able to use the tools; how the caregivers are applying the messages to their practices; and how the program team is providing mentoring and coaching to the volunteers to improve their interactions with caregivers. The program manager should use this information to analyze positive changes and existing challenges for caregivers to meet their needs and the needs of their children as well as staff and volunteer capacity building needs. After the program manager evaluates these successes and challenges, he/she should develop strategies to address these challenges that can be discussed during the monthly planning meetings with staff to guide their work with volunteers at the reflection meetings and during monitoring visits. The program manager should look for opportunities to share successes as well because this positive feedback will motivate staff and volunteers to continue their effective work.

#### D. Monthly Planning Meeting with Program Staff

1. **Timing:** At the end of each month. The duration of the meeting will be determined by the size of the team and the number of volunteers that they mentor.
2. **Purpose:** These meetings are an important way to build the team's support system. The program manager should guide the meeting but should incorporate opportunities for team members to work together and also to share their successes as individuals. The following section provides guidance on the components of this meeting:
3. **Agenda for Monthly Planning Meeting**
  - **Reflection:** Each staff member takes a few minutes to share what they are proud of this month in their own practice, or what they have observed with the volunteers and caregivers as well as what areas they see for improvement in their own practice for volunteers or caregivers.
  - **Program Manager synthesizes successes and challenges:** The program manager summarizes what the staff members have said and includes examples from his/her own field visits, information in the tools to support these successes and challenges.
  - **Staff member shares successful strategy:** Each month, a different staff member will have the opportunity to share a strategy or approach that they have found to be effective.
  - **Team develops strategy to address challenge in following month's activities:** Of the challenges that the staff and program manager previously mentioned, the team will select the most pressing challenge and will brainstorm strategies to overcome this challenge.
  - **Team plans activities for following month:** The team prioritizes their activities for the following month. During their planning, they should also decide how they can incorporate the positive feedback and strategy to address the immediate challenge in their interactions with volunteers.
  - **Individual meetings:** Immediately following the meeting or soon after, the program manager should schedule one-on-one meetings with each staff member. These meetings provide an opportunity to share specific feedback on the quality of the completed tools, address challenges and review professional goals to motivate staff members in their work. The program manager should also allow time for each staff member to give him/her feedback about how they are doing in preparing and motivating staff to carry out their responsibilities.

#### E. Mentoring Program Staff in the Field

Program managers should observe the work of their staff during home monitoring visits and reflection meetings to evaluate how they are able to mentor the volunteers. These monitoring visits should be intensive at the beginning of the program to ensure that the staff has the skills to guide the volunteers' work. After the visit or meeting, the program manager should hold a feedback session with the staff



member. Using the B.I.T.s approach, the staff member should first receive guidance on what she/he is doing well and together, they should develop clear strategies to improve the staff member's practice. If the team has the time, they can also work in pairs to mentor each other during field activities.

# Annex A

## Home Visit Monitoring Tool

Name of Community:		Name of Primary Caregiver:		
Name of Volunteer:		Name of Staff Member:		
Date of Visit:		Date of Last Visit:		
PART A: During the Visit				
	Question	Yes	No	Evidence
1.	Did the volunteer follow up from the last visit?			
2.	Did the volunteer follow the per-visit assessment?			
3.	Did the volunteer refer the caregiver to available services if needed?			N/A
4.	Did the volunteer praise the caregiver's positive practices?			
5.	Did the volunteer use messages from the Visual Guide?			
6.	Was the caregiver receptive to messages? (e.g., seemed interested in the volunteer's recommendations, asked questions, etc.)			
PART B: After the visit- Feedback Session with the Volunteer				
	Question	Response		
7.	How is the volunteer meeting the specific needs of the caregiver in this household?			
8.	What positive changes has the volunteer seen in this household?			
9.	What are the challenges of using the per visit assessment and visual guide?			
10.	What support does this caregiver need to meet the needs of his/her children?			
Comments:				

# Annex B

## Reflection Meeting Reporting Tool

Community: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Facilitator: \_\_\_\_\_ No of Participants Men: \_\_\_\_\_ Women: \_\_\_\_\_

**Note:** When writing response, include volunteers' names. For example, if Michael shares that three caregivers in the households he visits are now playing with their children, write Michael: 3 caregivers playing with children.

	Question	Response
Activity 1		
1	What is something the volunteers learned about ECD this month?	
Activity 2		
2	What positive changes has the volunteer seen in their home visits with caregivers and their children?	
3	What are they proud of in their own work?	
4.	What are the challenges for caregivers to care for their children?	
5	What are the challenges for volunteers to carry out their work?	
6	Which challenge did the group prioritize?	
7.	What is the strategy to overcome this challenge?	
Activity 3		
8.	What are the challenges of using the per-visit assessment or visual guide?	
9.	Is there anything that the volunteers would like to learn more about?	
Activity 4		
10.	What is the date and time of the next meeting?	
Comments:		

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# Annex C

## Notes to Reflection Meeting Facilitator

**Prepare:** Practice the activities discussed in the preparation meeting and review the visual reference guide and per-visit assessment before the meeting.

- **Create a Positive Environment:** Remind volunteers of the rules they created at the training so that everyone is encouraged to ask questions and give their opinion (One person speaks at a time, No laughing at others, Cell phones on silent, etc.) Make eye contact with participants and smile.
  - **Make Sure that Everyone can See Each Other:** The group should sit in a circle so that everyone can see each other. The facilitator should sit at the level of the participants.
  - **Promote Dialogue:** Ask open-ended questions beginning with why and how. Give time for volunteers to think before they share their opinion. Respond to their questions and explain doubts. Encourage volunteers to share their experiences with each other by asking:
    - “What do the others think about that?”
    - “Have you handled this in a different way?”
    - “Do you want her/him to explain more about why she did that and how?”
  - **Keep track of Time:** Use the guide to keep track of time so that the group has time to practice all of the activities and the volunteers do not become bored. Remember that the volunteers are very busy.
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# Annex D

## Reflection Meeting Sample Guide<sup>2</sup>

**Background:** Every month, the volunteers from each community gather to reflect on their practice and experiences with the caregivers during home visits. A program staff member facilitates the session. This presents an opportunity to document successes and lessons learned while encouraging information sharing and peer-to-peer learning.

**Time:** 1.5 hours

**Materials:**

**For Volunteers**

Visual Reference Guide

Completed Per-Visit Assessment Tools from previous month

**For Facilitator**

Meeting Guide

Visual Reference Guide

Per-Visit Assessment Tool

Reflection Meeting Reporting Tool

Chalkboard and chalk or Flip chart paper and markers

**Other possible materials:** household items with pictures (books, magazines, rice sacks), bottle caps, rocks, seeds to practice actions from child cards

### Activity 1: Welcome

**Time:** 10 minutes

**Steps:**

**1. Welcome activities** (2-3 minutes)

The facilitator leads participants in song or plays a game that volunteers can show caregivers to play with their children

**2. Take attendance** (2 minutes)

**3. Share Learning:** Can you share something you've learned about how children learn and grow this month (areas of development, child health, nutrition, hygiene, etc.)?

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<sup>2</sup> Kelly, M. & Llewellyn, D. (2009). **Learning Circle Facilitation Guides**. Mozambique ECD Program. Save the Children: Maputo, Mozambique.

## Activity 2: Reflection

**Time:** 45 minutes

**Introduction:** The facilitator explains that we are going to reflect on this month's activities. Before we start, let's remember the rules that we made during the training (respect one another, do not laugh at others, cell phones on silent, etc.).

### Steps:

- 1. Review goals from Foundation Training:** Why are we here? What do we hope to change in our community?
- 2. Share Professional Accomplishment related to the goals.** Each volunteer briefly describes something they feel proud of that they did in the past month, related to helping caregivers meet the needs of their children. Others listen but do not interrupt, comment or question.
- 3. Identify and describe a problem or challenge in the work related to the goal:** Next, each volunteer has 3-4 minutes to describe one problem they have identified. Others listen and do not comment. This helps volunteers develop listening skills and allows the speaker to reflect, as s/he speaks, without interruption. This also allows the sharing process to move quickly.
  - **Note:** Focus this section on barriers to services or challenges of sharing messages with caregivers. There is more time in Activity 3 to focus on the volunteer tools.
  - After the first meeting, follow-up on a challenge from last time: have the volunteers overcome this challenge? Did they use the strategy we discussed as a group or did some volunteers develop another strategy?
- 4. Problem Analysis:** The facilitator selects one problem to analyze. Group members ask information-seeking questions, pushing for clarification about the problem, but do not offer advice.
- 5. Problem–Solutions and Action:** The group then brainstorms possible solutions and assists the volunteer in developing an initial plan of action. At the next meeting the volunteer reports on the success of the plan.
- 6. Sharing: Building New Knowledge & Skills – Presentation:** The session concludes with a short presentation (5 minutes) by one of the members. S/he teaches a skill to the group, explains an effective strategy, or shares something recently learned. In the first meeting, the facilitator should have a short presentation prepared from the reflection preparation meeting. Selection for the next month's presentation often arises from the "Round About" in #2. There will be something that the group wants to learn more about. This provides a forum for volunteers to be recognized and develop leadership.

### Activity 3: Review Volunteer Tools

**Time:** 30 minutes

This should be an interactive activity where the group:

1. Decides which parts of the volunteer tools are most challenging
2. Discusses how to overcome these challenges
3. Practices using the tools in small groups through role plays or games.

### Activity 4: Closing

**Time:** 5 minutes

1. Decide date and time of next session.
2. Review the strategy to overcome the challenge developed in Activity 2.
3. Encourage the volunteers to meet before the next reflection meeting to reflect and plan together.
4. Thank the participants warmly for their participation and enthusiasm.