



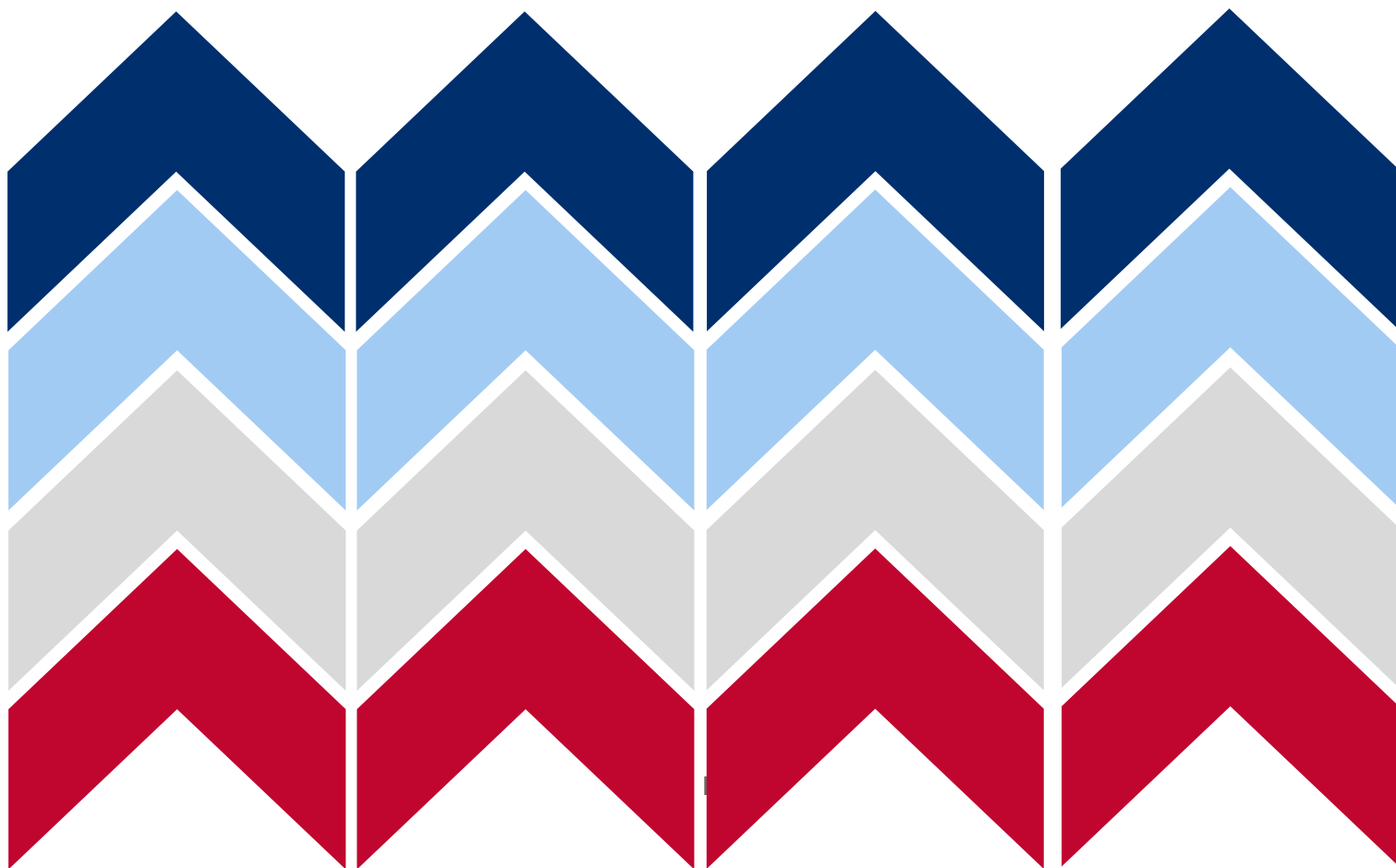
USAID
FROM THE AMERICAN PEOPLE



PEPFAR
U.S. President's Emergency Plan for AIDS Relief

ACHIEVE
ADOLESCENTS AND CHILDREN
HIV INCIDENCE REDUCTION
EMPOWERMENT & VIRUS ELIMINATION

Toolkit for Community-led Monitoring (and Momentum): Resources for Youth, Parents & Caregivers, Service Providers, Managers & Leaders Engaged in OVC & DREAMS Programming



DISCLAIMER

This Toolkit is made possible by the generous support of the American people through the United States Agency for International Development (USAID) and the U.S. President's Emergency Plan for AIDS Relief under the terms of Award No. 7200AA19CA00006. The contents are the responsibility of Pact and do not necessarily reflect the views of USAID or the United States Government.

ABOUT ACHIEVE

Adolescents and Children, HIV Incidence-reduction, Empowerment, and Virus Elimination—ACHIEVE—is USAID's flagship initiative to address the needs of children, young people, and breast-feeding women affected by HIV. This includes supporting local organizations in serving these populations and ultimately building their capability to receive direct U.S. government funding for programs at scale. The project leverages the full strength of its consortia and related private and public sector stakeholders to support countries attain and sustain HIV epidemic control. Led by Pact, core consortia partners include Jhpiego, Palladium, No Means No Worldwide, and WI-HER.



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Background

This Toolkit was developed with the support and guidance of a Core Design Team with representatives from eight countries in Sub-Saharan Africa (see text box below). Over a four-month period, this group met to review findings from a global survey and literature review and led in-country consultations to explore and define community-led monitoring (CLM) in the context of OVC and DREAMS programming. The adapted CLM definition, theory of change, and tools in this Toolkit were born out of this creative and consultative process.

Toolkit Vision

PEPFAR is calling on all partners to scale-up CLM to improve service quality and support better client outcomes.

Provide a simple set of tools that promote reflection, connection, dialogue, and action from the child/family through to the OVC/DREAMS service provider and wider community to achieve the best possible results across the service continuum.

Purpose

To strengthen community systems with guidance, tools that enable communities to use data to celebrate service provider success, identify and discuss challenges and priorities in a supportive environment, and catalyze efforts to improve services and support – with a particular focus on OVC and DREAMS programming.

Objectives

- To advance and contextualize CLM in OVC and DREAMS programming.
- To promote meaningful partnerships between clients, communities, and OVC/DREAMS service providers to achieve the best possible care and services.
- To create an enabling environment where client/community ideas, experiences, and feedback drive key adaptations to improve service quality.
- To inspire interconnected, independent, and spontaneous initiatives across the service continuum to achieve transformational change.

Audience

- Youth Beneficiaries
- Caregivers and Parents of Program Beneficiaries
- OVC & Dreams Service Providers
- Managers and Leaders of Organizations delivering OVC/DREAMS programming

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For more information on the theory and evidence behind CLM adaptation, please see Section 4.

Introduction

With knowledge of the CLM origins, steps, definitions, and key success factors, together with an understanding of the landscape in which OVC and DREAMS programs are implemented, this Toolkit embraces and celebrates the spirit of CLM, while also placing greater emphasis on the transformational aspects of the model, promoting reflective practice within and across multiple levels with the goal of enhancing engagement to address quality, impact and reach.

The original terminology for CLM does not name the action-oriented aspects of the approach, namely translating the data into meaningful solutions, engaging stakeholders to build support for the solution, and using the data and ideas to advocate for increased accountability. By adding another 'M' for momentum to the original construct, ACHIEVE hopes to **call more attention to the need for community leadership in both monitoring and building momentum toward the desired change or improvement.**

Definition

Within the scope of the ACHIEVE Project, CLM(M) is defined as...

a **transformational process** that encourages communities – especially beneficiaries, their families, and service providers – to make use of their data, experience, and ideas to inspire and sustain **meaningful improvements** across the **service continuum**.

Theory of Change

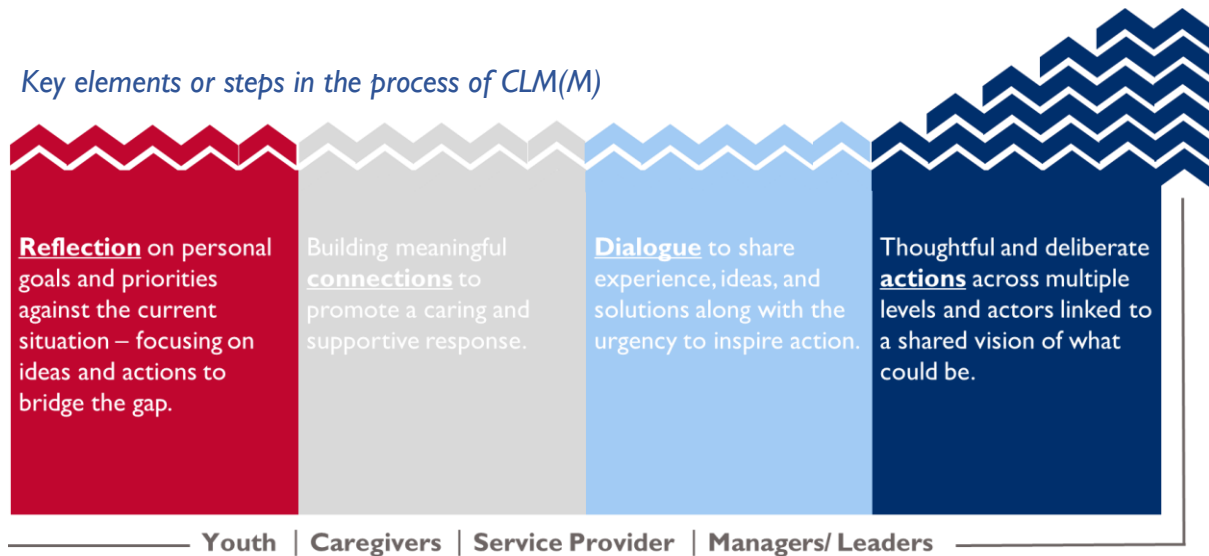
This definition is linked to the following Theory of Change (TOC):

IF	we support OVC and DREAMS service users and service providers to catalyze the best of what they each know and care about,
AND IF	we build energized relationships within and among these groups and the wider community,
TOGETHER WITH	positive attitudes, dialogue, and commitment toward a better collective future along the service continuum,
THEN	communities will create the conditions for proactive, spontaneous, and continuous efforts to maximize service quality, impact, and reach.

Bringing the TOC to Life

The TOC for CLM(M) recognizes the need to build **supportive and caring relationships** before, during and after services. It emphasizes on actions and interactions to celebrate progress and good practice, while asking **imagining and seeking new types of solutions and ideas** to achieve the best possible results. The process involves **reflection, connection, dialogue, and action** – engaging the heart and spirit to achieve a better collective outcome – see diagram on the following page.

Key elements or steps in the process of CLM(M)

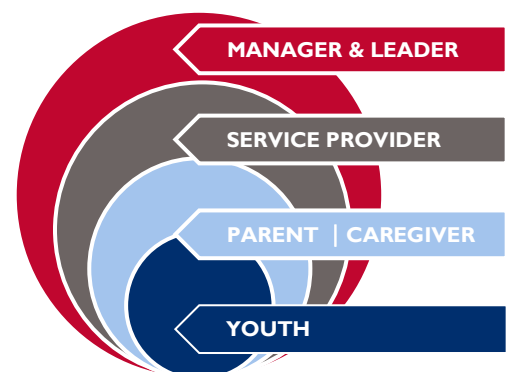


Criteria for Adapting and Developing Tools to Support CLM(M)

To implement this model, ACHIEVE is offering a **diverse set of tools** that can be integrated into day-to-day practice. They were developed in accordance with the data, evidence and experience reviewed by the Core Design Team using the following four criteria:

- **Provide simple tools** that are accessible to the community – including beneficiaries, caregivers/parents, service providers, and leaders/managers.
- **Seek actionable feedback** by encouraging communities to evaluate their situation and what they want to be/achieve, helping them to prepare to share with others.
- **Motivate change**, helping communities to recognize the strengths and assets they could immediately deploy to address the issue or need.
- **Promote meaningful relationships** to inspire a caring response and efforts to achieve the best possible results.

The tools were designed to mirror the socio-ecological model, recognizing that we need to emphasize self-leadership, leadership of others, and organizational leadership to fully implement CLM(M). The Toolkit is thus offering a range of tools for youth, parents/caregivers; service providers and managers/leaders—including journal pages, discussion prompts, energizers, reflective sessions, and worksheets. Note: some of these tools can be used by multiple audiences.



There are 4 tools for Youth:

- My Plans, Progress & Commitment: **Journal Pages**
- Before, During, and After Services: **Worksheet**
- Appreciating Good Services: **Reflection**
- Evaluating my Progress/Feedback Form: **Questionnaire**

There are 4 tools that Parents/Caregivers:

- Before, During, and After Services: **Worksheet**
- Appreciating Good Services: **Reflection**
- Helping Youth People to Communicate: **Ideas**
- Preparing to Give Feedback: **Worksheet**

There are 5 tools for Service Providers:

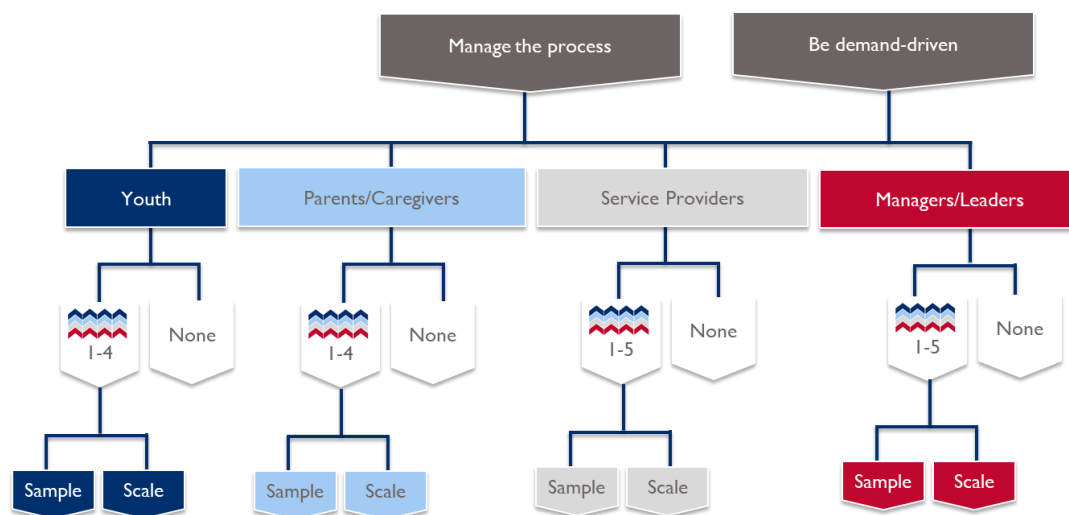
- Monthly Review: **Reflection**
- Helping Youth People to Communicate: **Ideas**
- Seeking Meaningful Feedback: **Discussion Prompts**
- Quarterly Review on Client Progress: **Reflection**
- Peer-to-peer Learning: **Dialogue Prompts**

There are 5 tools for Managers and Leaders:

- Monthly Review: **Reflection**
- Quarterly Review on Client Progress: **Reflection**
- Peer-to-peer Learning: **Dialogue Prompts**
- Building a Culture of Engagement for CLM(M): **Survey**
- Creative Ways to Gather Feedback: **Meeting Energizer**

Paths for CLM(M) implementation

Each project/service will need to determine how much they wish to (A) manage the process, and/or (B) be demand-driven. With a demand-driven approach, the project will seek to promote CLM(M), make the tools available, based on the level of interest from the different stakeholder groups. Alternatively, if the project seeks to manage the process, they will need to decide which groups they would like to work with, for example, they may choose to begin working with only one or two of the stakeholder groups, i.e. youth; parents/caregivers; service provider; or managers/leaders. Next they will select how many of the CLM(M) tools they would like to roll-out with each of the selected groups. Finally, they will need to choose whether they implement the CLM(M) tools among a sample of the group, or at-scale. The diagram below provides an illustration of the types of choices projects/services will need to consider.



With either path, consider the following cross-cutting issues:

- Seek ways to integrate CLM(M) into routine implementation for real-time adaptations and learning, while also ensuring that data and lessons are cascaded through the organization.
- Recognize the need to build comfort, confidence & skills to provide and receive feedback.
- Provide sufficient time to orient and inspire the champions/pioneers for CLM(M) - engaging local groups/associations as partners orienting, collecting, and sharing feedback, ideas & experience from their members. For example, this could working with GBV Survivor Networks or Networks of People Living with HIV to lead the roll-out of CLM(M) with their members.

When to Use the CLM(M) Tools

This Toolkit offers 12 unique tools, some which can be used by multiple audiences. The table offers a timeline/frequency for rolling-out the tools, using colours to highlight the intended users for each tool: ● youth; ● parent/caregiver; ● service provider; and ● manager/leader.

List of Tools	Timing/Audience
1. My Plans, Progress & Commitment: Journal Pages	Annually ● ●
2. Building a Culture of Engagement for CLM(M): Survey	Annually ●
3. Helping Young People to Communicate: Ideas	Anytime ● ●
4. Creative Ways to Gather Feedback: Meeting Energizer	Anytime ●
5. Before, During, and After Services: Worksheet	During Service Delivery ● ●
6. Seeking Meaningful Feedback: Discussion Prompts	During Service Delivery ●
7. Monthly Review: Reflection	Monthly ● ●
8. Peer-to-peer Learning: Dialogue	Monthly ● ●
9. Appreciating Good Services: Reflection	Quarterly/Semi-Annually ● ●
10. Feedback Form: Questionnaire	Quarterly ● ● ●
11. Preparing to Give Feedback: Worksheet	Quarterly ●
12. Quarterly Review on Client Progress: Reflection Session	Quarterly ● ●

How to get the most out of this Toolkit

This Toolkit and the accompanying Training Videos/Guide will provide you with the essential information that Managers/Leaders of OVC and DREAMS programs need to get started.

- **Section 1:** Provides background information on CLM(M) and the available tools.
- **Section 2:** Introduces the CLM(M) tools in detail with simple instructions on how to use them.
- **Section 3:** Summarizes the theory and evidence driving the development of the tools.
- **Section 4:** Highlights potential areas for innovation.

In addition to the Toolkit, a Training Guide and a Series of Videos are available to help introduce the concept, tools, theory, and innovations to your group or organization.

- **Video 1:** Introduction to CLM(M)
- **Video 2:** Theory & Evidence
- **Video 3:** CLM(M) Tools
- **Video 4:** Opportunities for Innovation & Thought Leadership

Finally, this CLM(M) Toolkit and the accompanying tools were developed by a Core Design Team representing eight different countries. This group could be an additional resource to you. Contact ACHIEVE to speak to a member near you.

SECTION 2

Tools to promote meaningful partnerships to achieve the best possible care and services

Promote **meaningful partnerships** to achieve the best possible care and services

Tool 2a-101 Before, During & After Services Worksheet

Before, During & After Services: **Worksheet**

Youth
Caregivers & Parents

Tool 2a-102 Helping Young People to Communicate: Ideas

Helping Young People to Communicate: **Ideas**

Caregivers & Parents
Service Providers

Tool 2a-103 Ideas for Appreciating Good Service

Appreciating Good Service: **Reflection**

Youth
Caregivers & Parents

An introductory video is available for these CLM(M) Tools; contact ACHIEVE for more information.

Tools for MM: *Before, During, and After Services: Worksheet*

When you go into a situation with a clear goal of what you want to achieve or learn, you are preparing yourself to get the most of each opportunity. @ACHIEVE, we want to help you to map out your priorities and goals before each session, take notes of key things you want to remember, and share ideas that will help the program adapt and improve.

YOUTH | CAREGIVERS: ANNUAL

INTRO: These pages will help you to prepare for different program services, take notes, and map out ideas to help you participate and give feedback.

TIME: 10-15 minutes
(before and after services)

MATERIALS: Worksheet & pens.

ADAPTATIONS: This activity can also be carried out with other program beneficiaries – using the questions to guide your discussion. You can re-create the designs and layout in any notebook in case you do not have enough copies.

STEPS:

Reflection:

1. Before traveling to the service point, or upon arrival, fill in the section: Before Services.
2. Write your responses in the space provided; use a new page before each service.

Connection:

3. During the session, use the space provided to write down key observations, information, and ideas – adding more pages if needed.

Dialogue:

4. Use your notes to help you to participate in the session – sharing your feedback, ideas, and suggestions.

Action:

5. After the session, take a few minutes to reflect on the overall session, and what you are inspired to do as a result of what you have learned.

Be creative as you make this a habit. Add different types of designs and shapes to design your own worksheets.

NOTES (MINI-VIEW):

The worksheet is titled "Tools for MM: Before, During & After Services: Worksheet". It includes fields for "Date:" and "Service:". The "BEFORE SERVICES" section contains two prompts: "In today's session, I hope to..." and "I would like to ask about...". The "DURING SERVICES" section has a "Notes:" label and a large area with horizontal lines for writing. The "AFTER SERVICES" section includes a dashed box for "Something that made me happy:", a list of dots for "Things I wish we could do differently:", and a prompt "Something I would like to share or do with the information/skills that I gained today:". A lightbulb icon is next to the "Things I wish we could do differently:" prompt. The page number "11" is at the bottom.

Tools for MM: *Before, During & After Services: Worksheet*

Date: _____

Service: _____

BEFORE SERVICES	In today's session, I hope to...
	I would like to ask about...
Notes:	
<div>DURING SERVICES</div>	

Something that made me happy:

Things I wish we could do differently:

-
-
-
-



Something I would like to share or do with the information/skills that I gained today:

AFTER SERVICES

Appreciating good services: Reflection / Ideas

By focusing on the positive, we help people to feel good about what they are already doing well and encourage them to keep it up. @ACHIEVE, we want to promote quality services at the community level by helping to bring attention to what is already working – helping to sustain staff and volunteer commitments to serve others.

INTRO: This activity will help you to find different ways that you can bring attention to the staff and volunteers who are providing services that make a positive impact in the community.

TIME: 1 hour

MATERIALS: Various stationary.

ADAPTATIONS: This activity can also be carried out with other program beneficiaries – using the questions to guide your discussion.

STEPS:

Reflection:

1. By yourself, or with a friend, answer the questions on the sheet.

Connection:

2. If you feel it would be appropriate to recognize the staff/volunteers in your community, choose one of the options for appreciating good service.

Dialogue:

3. Talk with others who have also been impacted by the service or support and invite them to work with you.

Action:

4. Be genuine in your recognition of the staff and volunteers, honest praise is a helpful way to bring attention to everyday heroes that exist in the community and inspire others to follow in their steps.

IDEAS (MINI-VIEW):

Tools for MM: Ideas for Appreciating Good Service

Think of the different services, or project activities that you participated in this month. Which ones were most special to you?

What did the service providers or organizers do that made this session/activity meaningful? (1 box/person)

What would happen...?

...in the project, if we bring more attention to these stories of service:

...in the community, if we bring more attention to these stories of service:

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Appreciating Good Service

Beneficiaries – Youth & Adults

There are many ways that you could celebrate good services and support. Read through the ideas and consider trying one of them:

1. Give immediate feedback
2. Write a letter
3. Make a certificate of appreciation
4. Celebrate service providers at community/cultural/spiritual gatherings

1. Give immediate feedback: let them know that they are giving you the kind of help that you need. At the end of a meeting, or right in the moment, here are some simple ways to appreciate the good things they are doing:

Thank you for... I appreciate each time you... I am grateful for... The way that you ... is so helpful.

2. Write a letter: tell them how your life is changing as a result of their support. Here are some writing prompts:

- Thank you for always _____
- I am grateful to you for _____
- I wish that others had someone like you to _____

3. Make a certificate of appreciation for each volunteer. Working together with other participants in the program, you can create a certificate of appreciation that is signed by each member and organize a small handover ceremony. If possible, invite the volunteers' immediate family to join so that they hear how the volunteer is having an impact in the community.



4. Celebrate service providers at community/cultural/spiritual gatherings: Ask local authorities to recognize community service during their regularly scheduled events and use these opportunities to draw attention to the stories of compassion, care and service experience in this program (and others). Encourage them to make it a tradition and help them get the practice started by offering several names and stories of their service and impact. These types of efforts, not only help to celebrate the good things happening in the community, they demonstrate the kinds of behaviors and actions that are valued among members and signal to others what they could also do to better help others.

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Tools for MM: *Ideas for Appreciating Good Service*

Think of the different services, or project activities that you participated in this month. Which ones were most special to you?

What did the service providers or organizers do that made this session/activity meaningful? (1 box/person)

A line drawing of several hands reaching up, some forming heart shapes, with small hearts floating above them.A line drawing of several hands reaching up, some forming heart shapes, with small hearts floating above them.A line drawing of several hands reaching up, some forming heart shapes, with small hearts floating above them.

What would happen...?

...in the project, if we bring more attention to these stories of service:

...in the community, if we bring more attention to these stories of service:

Appreciating Good Service

There are many ways that you could celebrate good services and support. Read through the ideas and consider trying one of them:

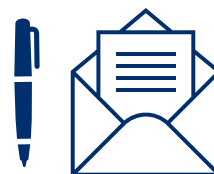
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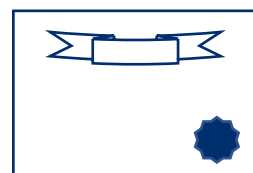


2. Write a letter: tell them how your life is changing as a result of their support. Here are some writing prompts:

- Thank you for always _____.
- I am grateful to you for _____.
- I wish that others had someone like you to _____.



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Helping Young People to Communicate: Ideas

When you talk with your children, you show them you care, and you learn about their hopes, progress, and worries – information that will help you to be more supportive. @ACHIEVE, we want to help you to have meaningful conversations with your children so that you can track your child's progress (both in the program and out) and provide encouragement and support.

INTRO: This tool offers ideas that will help you to have caring conversations with your children. Through your discussions, you will get new insights into their situation, and be able to provide the support or encouragement they may need.

TIME: 30 minutes

MATERIALS: Worksheet & pens.

ADAPTATIONS: This activity can also be carried out at the household level among caregivers and/or other adult members – reading through the options together and agreeing which ones the family could try.

STEPS:

Reflection:

1. Read the page and use the questions and conversation prompts to think about how you could have better conversations at home.

Connection:

2. Use a few of the prompts in your next conversation with your child and set a goal of having some quality time each day to talk to him/her.

Dialogue:

3. As you talk, pay close attention to your child's words and body language, and try to be as supportive as possible. Be honest and genuine as you share, letting them know that they can trust you.

Action:

4. Your child is counting on you to act in their best interest – let these conversations guide you – helping you to understand and respond to their needs, concerns and ideas.

Caregivers

Tool for MM: Helping Children to Find Their Voice

As a parent or caregiver, you can help your children to go into new situations with confidence and get the most out of each new opportunity. This begins with helping your children to share their hopes, ideas, and needs. These experiences will touch your heart as you get to know your children and better understand their feelings and perspective. You will also get new insights into how you can better support and encourage your child.

Questions for Reflection:

- Do your children come to you to share their thoughts, feelings, and ideas?
- How might your relationship become stronger if you talk more often?

Phrases¹ for More Meaningful Conversations and Connections:
Here are some ways that you could start or encourage the conversation, choose 1 or 2 prompts to set a supportive and caring tone in your discussion.

Sharing Concerns

Things you can say when your child looks worried, and you want to understand the situation and offer encouragement:

- I am happy to talk with you...
- I believe in you...
- You are capable...
- You are brave...
- Trust your instincts...

If at anytime, your child shares information about a health or safety at risk, seek appropriate help for prevention and response.

Building confidence

Things you can say when your child feels discouraged and you want to give them a confidence boost...

- You are valuable...
- You are interesting...
- Your choices matter...
- I am proud of you...
- You make a difference...

With your words and actions, show your children that you care. Let them know that you want to help them through any difficult moments or situations.

¹ These discussion prompts and questions have been adapted from *Bounce Back Parenting*, and *50 Questions to Ask Instead of How Was Your Day?*

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Caregivers

Progress in School...

Things you can say when your child comes home from school to learn about their day and understand their progress...

- I'm glad you're home...
- What did you learn today?
- I see you working and learning every day...
- What made you feel happy?
- If you could change one thing about your day, what would it be?

When you show interest in their experience, you reinforce how much you care, and learn new ways to offer support or encouragement.

Progress in the Program...

Things you can say before they are about to attend a project service/event and you want to show them you are supportive:

- I am happy for you...
- What do you hope will happen?
- You are deserving...
- You are important...
- If you could change places with the facilitator, what would you do or teach?

As children talk about their expectations, you help them to prepare and participate effectively in upcoming events/sessions.

Sharing their Thought & Ideas

Things you can say to encourage your child to express their thoughts and ideas:

- I am curious what you think...
- Your ideas are interesting...
- Thank you for contributing...
- Your ideas are worthwhile...

Your child will be motivated to express their ideas and contribute to the conversation when you encourage them to share.

Valuing their Thoughts & Ideas

Things you can say anytime and often to show how much you care:

- You are loved...
- Your ideas matter...
- I believe in you...
- Trust your instincts...
- I'm proud of you...

With positive feedback from you, accepting and appreciating them and their ideas, you help to build their confidence and inspire them to take initiative.

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Tool for MM: *Helping Young People to Communicate: Ideas*

As a parent or caregiver, you can help your children to go into new situations with confidence and get the most out of each new opportunity. This begins with helping your children to share their hopes, ideas, and needs. These experiences will touch your heart as you get to know your children and better understand their feelings and perspective. You will also get new insights into how you can better support and encourage your child.

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Valuing their Thoughts & Ideas

Things you can say anytime and often to show how much you care:

- **You are loved...**
- **Your ideas matter...**
- **I believe in you...**
- **Trust your instincts...**
- **I'm proud of you...**

With positive feedback from you, accepting and appreciating them and their ideas, you help to build their confidence and inspire them to take initiative.

Tools to encourage community ideas, experience & feedback for more responsive services

Community **ideas, experience** and **feedback** can inspire new improvements and adaptations for more responsive services.

The image displays four CLM(M) Tools arranged in a row. Each tool is shown as a preview of its document, with a title bar and a description below it. The tools are: 1. 'Plans, Progress & Commitment: Journal Pages' for Youth, which includes two pages with writing lines and a small illustration of a person. 2. 'Preparing to Give Feedback: Worksheet' for Caregivers, which is a single page with a list of questions and a small illustration of a person. 3. 'Seeking Meaningful Feedback: Discussion Prompts' for Service Providers, which is a single page with a list of prompts and a small illustration of a person. 4. A fourth tool, 'Plans, Progress & Commitment: Journal Pages' for Caregivers, which is a single page with writing lines and a small illustration of a person.

Plans, Progress & Commitment: Journal Pages
Youth

Preparing to Give Feedback: Worksheet
Caregivers

Seeking Meaningful Feedback: Discussion Prompts
Service Providers

An introductory video is available for these CLM(M) Tools; contact ACHIEVE for more information.

My Plans, Progress & Commitments: Journal Pages

When you take time to reflect on your progress, you get new ideas and insights into what is working, what could be better, and what you might want to change. @ACHIEVE, we want to help you to think about how the project services can help you to achieve your goals and connect with the service providers and your community to get the best possible results.

INTRO: This set of questions will inspire you to think about your goals, your progress, and ways that you can engage in the program and community to get the help you need.

TIME: 1 hour.

MATERIALS: Worksheet & pens.

ADAPTATIONS: This activity can also be carried out with a trusted friend - use the questions to guide your discussion. You can re-create the designs and layout in any notebook in case you do not have enough copies of the worksheets.

STEPS:

Reflection:

1. Find a quiet and private place where you will not be interrupted.
2. Read through the questions and give yourself time to think deeply about each one before answering.
3. Write your responses in the space provided, adding more pages if needed.

Connection:

4. Look at the program people that you have listed.
5. Plan to meet with one of them to talk about your progress.

Dialogue:

6. Thank them for what they are already doing to help you.
7. Discuss your ideas on how you can get the most out of the project and share your hopes for the future.

Action:

8. Taking time to journal helps you to evaluate your situation, learn from your progress and challenges, and commit to change.

JOURNAL PAGES (MINI-VIEW):

Tool for MM: **Journal Pages**

What do you want most in life?

What are you already doing that is moving you in the right direction?

What obstacles seem to be in the way? What could you do about them?

Who are the people in your family/community/ACHIEVE that you can turn to for guidance or support?

Key people: _____ Ways you could reach out to them: _____

Beneficiaries – Youth & Adults

Tool for MM: **Journal Pages**

Think of a time when you did not get the help or encouragement you needed.

What do you think contributed to this situation?

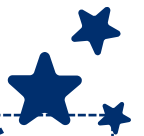
How could you avoid this from happening in the future?

How might ACHIEVE be a game-changer in your life?

What will you do to get the most out of each ACHIEVE activity or service?

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Tool for MM: *Journal Pages*



What do you want most in life?

-
-
-

What are you already doing that is moving you in the right direction?

What obstacles seem to be in the way? What could you do about them?

Who are the people in your family/community/project that you can turn to for guidance or support?



Key people:

Ways you could reach out to them:

Tool for MM: **Journal Pages**

Think of a time when you did not get the help or encouragement you needed. Write about it.

What do you think contributed to this situation?

How could you avoid this from happening in the future?



How might **ACHIEVE** be a game-changer in your life?

What will you do to get the most out of each ACHIEVE activity or service?

1

2

3

4

Preparing to Give Feedback: Worksheet

When you share your observations and ideas with others, you provide important perspective that could make things better. @ACHIEVE, we want to learn from what you see and experience during the program services, and hope that these questions will help you to organize your thoughts and prepare to share your recommendations.

INTRO: This worksheet will help you think of ways that you can share what you know and have observed in the program – information that will prepare you to give feedback.

TIME: 10-15 minutes

MATERIALS: Worksheet & pens.

ADAPTATIONS: This activity can be carried out in groups of people who have been accessing the same service – using these questions as a guide, you can record the responses on a flipchart and practice sharing your observations.

STEPS:

Reflection:

1. Read through and respond to the questions on the worksheet.
2. As you write down your observations, think about how they make you feel, possible solutions, and your role in implementing the solution.

Connection:

3. If you do not yet feel comfortable sharing your observations with a service provide or staff member in the program, share your observations with a trusted friend and discuss the best way to share your feedback. Note: in case any issue is critical to someone's well-being, or safety, seek help to report immediately.

Dialogue:

4. As you share, be open to the ideas and suggestions of others; there will likely be multiple options for solving the issue.

Action:

5. Demonstrate your support and desire for solutions by listening to the reactions and ideas from others.
6. Do not get discouraged if people do not immediately understand and accept your observations. They may need a bit of time to unpack what you are saying and the implications for the program. You can keep the conversation going by talking with others at different levels of the program– they may be able to help bring out the issue in a different way that will help you to get the desired result.

WORKSHEET (mini-view)

Coregivers

Tool for MM: Preparing to Give Feedback

Use the questions below to reflect on how you are currently providing feedback and the kind of feedback that you would like to provide to make the program better for you and for others.

1. What happens when we give people positive feedback?

2. How do you think they feel when they receive your feedback?

3. What are some things that you have observed in the program that the service providers in the program may not know?

4. Put a "W" next to the observations (above) that are affecting the quality or impact of the service. Then reflect on your feelings, possible solutions, and possible action that you could take to help respond to each challenge. Use the boxes below to help you map out talking points that could guide you in sharing these observations...

I have noticed...	I feel...	Going forward, could we...	I am prepared to...
5. How might services change or improve if you provide this feedback?

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Tool for MM: *Preparing to Give Feedback: Worksheet*

Use the questions below to reflect on how you are currently providing feedback and the kind of feedback that you would like to provide to make the program better for you and for others.

- I. What happens when we give people positive feedback?

2. How do you think they feel when they receive your feedback?

3. What are some things that you have observed in the program that the service providers in the program may not know?

4. Put a '*' next to the observations (above) that are affecting the quality or impact of the service. Then reflect on your feelings, possible solutions, and possible action that you could take to help respond to each challenge. Use the boxes below to help you map out talking points that could guide you in sharing these observations...

I have noticed...	I feel...	Going forward, could we...	I am prepared to...

5. How might services change or improve if you provide this feedback?

Seeking Meaningful Feedback: Prompts

Beneficiaries have important observations and ideas that could make program services more effective and desirable. @ACHIEVE, we want to help you to be more proactive in seeking information that will help you to achieve the best possible results.

INTRO: These sample questions will help you to ask for feedback during day-to-day service delivery.

TIME: 30 minutes

MATERIALS: Notebook & pen to record feedback (optional).

ADAPTATIONS: You can ask these questions in a one-on-one setting, or with a group of beneficiaries.

STEPS:

Reflection:

1. Review the three sets of questions and choose one that you will use over a period of one-month with the beneficiaries in your caseload.

Connection:

2. Include these questions at the beginning or end of one of your regularly scheduled sessions and listen attentively to the responses.

Dialogue:

3. Appreciate all feedback provided and summarize the key points to ensure that you have understood their input.
4. Be honest and open on issues that you cannot immediately address, and commit to escalate issues or concerns to your Line Manager in the program.

Action:

5. Make it a habit to pause and ask for feedback during your sessions, so that you can rapidly respond to issues or needs as much as possible.
6. Be an advocate for the beneficiaries, sharing this feedback more widely across the program – bringing

attention to their concerns and ideas. (Note: remember to respect the privacy and confidentiality of services by not mentioning the names of the people who have shared this feedback.)

PROMPTS (MINI-VIEW)

Service Providers

Tool for MM: Seeking Meaningful Feedback: Prompts

Questions to collect feedback on barriers to services, and to brainstorm possible solutions:

1. Is there anything that makes it hard for you to access this service?
What kinds of things would make it easier?

Questions to explore beneficiary perspective on progress and ways to improve or speed up the pace of change:

2. Are you satisfied with your progress?
What would you like to change?

Questions to explore issues that may hinder progress and ways to overcome those challenges:

3. Is there anything holding you back from progressing in the program?
How can we work together to overcome those challenges?

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Tool for MM: Seeking Meaningful Feedback: Prompts

Questions to collect feedback on barriers to services, and to brainstorm possible solutions:

1

Is there anything that makes it hard for you to access this service?

What kinds of things would make it easier?

Questions to explore beneficiary perspective on their progress and ways to improve or speed up the pace of change:

2

Are you satisfied with your progress?

What would you like to change?

Questions to explore issues that may hinder progress, and ways to overcome those challenges:

3

Is there anything holding you back from progressing in the program?

How can we work together to overcome those challenges?

Tools to promote positive attitudes, dialogue & commitment toward a better collective future



An introductory video is available for these CLM(M) Tools; contact ACHIEVE for more information.

Building a Culture of Engagement for CLM(M)

When staff are engaged, they care about their work, they feel empowered to share feedback and ideas, and they strive for excellence. @ACHIEVE, we want to promote and strengthen engagement at all levels of the project – building a culture that values the feedback and ideas of all members and promotes energized and supportive partnerships to achieve the best possible results.

INTRO: This electronic survey will help projects to assess the level of engagement across the team and identify potential issues that could hinder the roll-out and effectiveness of CLM(M) efforts.

TIME: 10-15 minutes/person to complete the survey; 60-90 minutes for discussion.

MATERIALS: None.

ADAPTATIONS: The paper version of the survey is also available.

STEPS:

Reflection:

1. Senior staff within the project should introduce the purpose and rationale for the Engagement Survey and encourage all staff/volunteers to participate.

Connection:

2. Share the survey link and keep the survey open for 1-2 weeks.

Dialogue:

3. Once the survey has closed, immediately share the feedback, and invite each program to review and discuss the findings with their teams using the following questions:
 - a. What are the findings telling us?
 - b. Is there anything surprising?
 - c. Where do we seem to be performing best?
 - d. Where do we need to improve?

Action:

4. Encourage the team to use the findings to identify priority actions as individuals, and for the project.

5. Encourage the team to use the findings to identify priority actions as individuals, and for the project.
6. Request each country program to identify 2-3 priority actions for the next year.
7. Consolidate all priority actions into a single plan and monitor the progress quarterly, updating the priority actions as needed.
8. Conduct the survey again in 18-24 months.

ONLINE SURVEY (MINI-VIEW)

The screenshot shows a web-based survey interface. At the top, there are two tabs: 'Questions' and 'Responses'. The main title is 'Building a Culture of Engagement for Community-led Monitoring & Momentum'. Below the title is an introductory paragraph: 'When people are engaged at work, they are inspired to do their best, they communicate in positive ways, and they encourage others to be proud of what they have accomplished[1]. This survey will help you to evaluate your experience in the USAID/PEPFAR-funded ACHIEVE program and will provide useful insights for improving management practice in the coming year.' Below this is a citation: '[1] This tool was adapted from: Harvard School of Public Health, Centre for Public Health Preparedness, 2010. Volunteer Self-Assessment Questionnaire, and https://www.tahititf.com/hr/resources/employment-engagement-survey-questions'. The survey contains four questions, each with a 5-point Likert scale (1 to 5) represented by radio buttons. The questions are: 1. 'How well do you feel you understand the program vision and goals? (1=very little; 5=very much)', 2. 'To what extent do you feel like your work is important for achieving the program goals? (1=very little; 5=very much)*', 3. 'Do you feel like your skills and capabilities are being fully utilized? (1=very little; 5=very much)', and 4. 'Do you use and suggest innovative ideas at work? (1=very little; 5=very much)*'.

Tools for MM: **Building a Culture of Engagement for CLM(M)**

When people are engaged at work, they are inspired to do their best, they communicate in positive ways, and they encourage others to be proud of what they have accomplished². This survey will help you to evaluate your experience in this program and will provide useful insights for improving management practice in the coming year.

Date: _____

1. How well do you feel you understand the program vision and goals? (1=very little; 5=very much)

1	2	3	4	5
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2. To what extent do you feel like your work is important for achieving the program goals? (1=very little; 5=very much)

1	2	3	4	5
---	---	---	---	---

3. Do you feel like your skills and capabilities are being fully utilized? (1=very little; 5=very much)

1	2	3	4	5
---	---	---	---	---

4. Do you use and suggest innovative ideas at work? (1=very little; 5=very much)

1	2	3	4	5
---	---	---	---	---

5. To what extent do you feel like your ideas and suggestions are listened to and considered? (1=very little; 5=very much)

1	2	3	4	5
---	---	---	---	---

6. Do you enjoy working with your team? (1=very little; 5=very much)

1	2	3	4	5
---	---	---	---	---

7. Overall how would you rate your level of confidence in performing the work you were assigned to do?

Very Confident	Somewhat Confident	Not Very Confident	Not Confident at all
----------------	--------------------	--------------------	----------------------

8. Do you receive feedback that inspires you to do better work?

Yes	No	Sometimes
-----	----	-----------

9. Do you have data to track the progress and impact of the work you do?

Yes	No	Sometimes
-----	----	-----------

10. Is there anything else you would like to share that you find important to your experience in this program?

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11. What best describes your role in the program?

Director/Manager	Coordinator	Advisor	Service Provider	Other
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² This tool was adapted from: Harvard School of Public Health, Center for Public Health Preparedness. 2010. Volunteer Self-Assessment Questionnaire, and <https://www.talentlyft.com/en/resources/employee-engagement-survey-questions>

Creative Ways to Gather Feedback: Meeting Activities

By using regular meetings to reinforce the practice of collecting and sharing ideas and feedback, you can easily connect with the challenges and accomplishments the team is experiencing while also model practices that can be adopted at different levels of the organization. @ACHIEVE, we want to use interesting and engaging ways to collect and use feedback and learn from the team's experience.

INTRO: These simple activities could be included in any meeting to energize the participants or build a sense of connection/team.

TIME: Varies

MATERIALS: Optional – flipchart paper and markers.

ADAPTATIONS: These activities could be implemented in a shorter time if the participants are invited to share in pairs and a selected number are invited to share with the full group.

STEPS:

Reflection:

1. Read through the proposed meeting activities and select one that is appropriate for your next meeting.

Connection

2. As you introduce the activity to the participants, explain why you have chosen it and let the participants know that it is a 'safe space' to share anything they like.

Dialogue

3. Use the dialogue prompt in the exercise you have chosen to begin the sharing and demonstrate your willingness to be vulnerable among the participants by going first. (Note: You will help to set the tone for openness and honesty based on what you begin with.)

Action

4. Make a note of key feedback or experiences that were shared and find time to learn more about the situation and how the project could be proactive in assisting service

providers to handle these types of situations.

5. After concluding the activity as per the directions, ask the members to share their feedback on the exercise, and how they might be able to adapt

MEETING IDEAS (MINI-VIEW):

Managers & Leaders	
Tool for MM: Ideas for Integrating Feedback Options During Regular Meetings	
Energizer: This month, I am most proud of...	Experience Sharing: Happy or Difficult Moment
Purpose: Invite participants to share a recent accomplishment on the project.	Purpose: Invite participants to share a recent experience on the project – a happy or difficult moment.
Planning Considerations: <ul style="list-style-type: none">• Do this activity at the start of a meeting, or at a time where you want to re-energize the group.• Break into smaller groups if you have more than 20 participants.	Planning Considerations: <ul style="list-style-type: none">• Do this activity at the start of a meeting, or at a time where you want to encourage deep discussion and team building.• Break the participants into smaller groups of 8-10 people.
Time: 1-2 minutes for each participant.	Time: 3-4 minutes for each participant.
Steps: <ol style="list-style-type: none">1. Invite everyone to stand or sit in a circle.2. Explain that this is an Energizer that will give us a chance to celebrate the good things that are happening in the program.3. We will all take a turn to share one thing that happened recently in the program that we are proud of.4. Start the process, by sharing from your own experience.5. After each person speaks, congratulate them, thank them.6. After the entire group has shared something, discuss how the energy in the group has changed after this exercise. Explore how you could continue to engage and consult each other based on their recent accomplishment.7. Then ask the group to consider ways that they could repeat this exercise in other meetings they lead.8. Close the session by encouraging participants to continue to be proud of what they accomplished and to continue to share their experience with others.	Steps: <ol style="list-style-type: none">1. Invite everyone to stand up or sit in a circle.2. Explain that this activity that will give us a chance to share a recent experience – good or bad – because we can learn from each type of experience. We will all take a turn to share one thing.3. Start the process, by sharing from your own experience – consider sharing a difficult moment to demonstrate that it is a safe space to share.4. After each person speaks, thank them for what they have shared.5. After the entire group has shared something, invite a few people to comment on what we can learn or take away from the difficult moments!6. Then discuss what we can learn or take away from the positive moments!7. Close the session by asking the group to consider ways that they could repeat this exercise in other meetings they lead.

Tool for MM: Ideas for Integrating Feedback Options During Regular Meetings

Energizer: This month, I am most proud of...	Experience Sharing: Happy or Difficult Moment
Purpose: Invite participants to share a recent accomplishment on the project.	Purpose: Invite participants to share a recent experience on the project – a happy or difficult moment.
Planning Considerations: <ul style="list-style-type: none"> • Do this activity at the start of a meeting, or at a time when you want to re-energize the group. • Break into smaller groups if you have more than 20 participants. 	Planning Considerations: <ul style="list-style-type: none"> • Do this activity at the start of a meeting, or at a time where you want to encourage deep discussion and team building. • Break the participants into smaller groups of 8-10 people.
Time: 1-2 minutes for each participant.	Time: 3-4 minutes for each participant.
Steps: <ol style="list-style-type: none"> 1. Invite everyone to stand or sit in a circle. 2. Explain that this is an Energizer that will give us a chance to celebrate the good things that are happening in the program. We will all have a turn to share one thing that happened recently in the program that we are proud of. 3. Start the process, by sharing from your own experience. 4. After each person speaks, congratulate them, thank them. 5. After the entire group has shared, discuss how the energy in the group has changed after this exercise. Note how the exercise enabled the participants to identify different strengths and accomplishments within the group. 6. Then ask the group to consider ways that they could reach out to their colleagues after the meeting to learn more. 7. Close the session by encouraging the participants to use this exercise in other project meetings. 	Steps: <ol style="list-style-type: none"> 1. Explain that this activity will give us a chance to share a recent experience – good or bad – on the project. Reassure the participants that we can learn from each type of experience, and sharing the happy and difficult moments is a sign of a strong and supportive team. 2. Start the process, by sharing from your own experience – consider sharing a difficult moment to demonstrate that it is a safe space to share. Then invite the participants to meet in smaller groups and share. 3. After each person has had a chance to share in the small groups, invite everyone to come together. Ask the members to talk about any common points they noted in the happy or difficult moments in their group. Discuss any action that the staff or project could take in response to the team's experience. 4. Close the session by asking the group to consider ways that they could repeat this exercise in other meetings they lead.

Monthly Review on Service Delivery: Questions for Dialogue

Service providers have a wealth of information and experience that could inform key program improvements and adaptations – especially client feedback and recommendations. @ACHIEVE, we want to help you to draw on this information to celebrate good work and support learning and adaptation across the program.

INTRO: This set of questions could be integrated into monthly review meetings or supportive supervision visits to gain new insights on staff or volunteer performance.

TIME: 90 minutes

MATERIALS: Flipchart paper & markers.

ADAPTATIONS: This activity can also be conducted independently by each service provider, inviting them to write their responses on a sheet of paper or photocopying the questions.

STEPS:

Reflection:

1. Begin the activity by explaining that these questions are designed to help us to learn from our experience, feedback and observations.

Connection:

2. Focus on one block of questions at a time (for example, discussion all questions under Section A) and invite the participants to share their responses with the person seated next to them.
3. Then invite the participants to share with the full group. (Depending on the size of the group, you may want to invite just a few members to share.)
4. Repeat for Section B.

Dialogue:

5. Note common issues or challenges across different service providers and invite people to share how people may already have started to address these issues.

6. As a group brainstorm how the project services could adapt or improve (Section C). Encourage the participants to identify creative, simple, and practical ways to act on the feedback and observations.

Action:

7. Identify technical assistance needs and plan for additional coaching and mentorship where required.
8. Encourage the participants to learn from each other's experience and be proactive in adapting services in response to feedback.
9. Continue to emphasize the need for service provider initiative in seeking feedback and ideas to maximize service quality and outcomes.

REFLECTION (MINI-VIEW):

Managers & Leaders

Tools for MM: Monthly Review: Reflection

A. How do you feel about the services that you provided this month?

What are you most proud of...	What are you struggling with...	What do you wish you could try/change...

In what ways, can you grow your knowledge and skills in these areas?

--	--	--

B. What are your clients telling you about the services and support you provide?

The most helpful feedback you received:	The most hurtful or challenging feedback you received:	The most confusing feedback you received:

Why do you think clients/beneficiaries responded in this way?

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C. How can you use this feedback to improve services/support?

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Tools for MM: **Monthly Review: Reflection**

A. How do you feel about the services that you provided this month?

What are you most proud of...	What are you struggling with...	What do you wish you could try/change...
In what ways, can you grow your knowledge and skills in these areas?		

B. What are your clients telling you about the services and support you provide?

The most helpful feedback you received:	The most hurtful or challenging feedback you received:	The most confusing feedback you received:
Why do you think clients/beneficiaries responded in this way?		

C. How can you use this feedback to improve services/support?

Tools to inspire community initiatives to maximize service quality and results

The image displays three CLM(M) Tools designed to inspire community initiatives. Each tool is presented as a document thumbnail with a corresponding title and target audience below it.

- Tool 1: Peer-to-Peer Learning Dialogue Prompts**
Target Audience: Service Providers, Managers & Leaders
- Tool 2: Feedback Form: Questionnaire**
Target Audience: Youth, Caregivers & Parents
- Tool 3: Quarterly Review on Client Progress Reflection**
Target Audience: Service Providers, Managers & Leaders

On the right side of the graphic, a dark grey triangle contains the following text:

Inspire **independent, interconnected and spontaneous initiatives** to maximize service quality & results.

An introductory video is available for these CLM(M) Tools; contact ACHIEVE for more information.

Feedback Form

When you share your experience and offer ideas about what could be improved, you can help programs to serve you better. @ACHIEVE, we want to help you to feel more confident and ready to share your observations and recommendations.

INTRO: *This tool will help you to share your feedback and ideas to get the most the services and support that you are receiving.*

TIME: 30-45 minutes

MATERIALS: Worksheet & pens.

ADAPTATIONS: This activity can also be carried out with other program beneficiaries – using the questions to guide your discussion. You can re-create the designs and layout in any notebook in case you do not have enough copies of the worksheets.

STEPS:

Reflection:

1. At the end of a session or service, fill in the questionnaire.

Connection:

2. You can hand in the questionnaire or refer to it during a project-level focus group discussion.

Dialogue:

3. Share your ideas with others – note the areas where you have common observations and experiences, as well as the different ideas you have provided.





Action:

4. Be proactive in sharing your ideas and suggestions in a positive and encouraging way – building energy and enthusiasm for the potential changes that could make the program better.

QUESTIONNAIRE (MINI-VIEW):

Tool for MM: **Feedback Form**





1. What services/support did you receive today? Please rate your satisfaction with each:

Service:	Rating:
	   

2. What (if anything) would you like to change?

3. How could you help to achieve make things better?

4. Please indicate how you feel about your progress:






Why do you feel this way?

5. How could the program adjust or adapt based on your progress?

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Tool for MM: **Feedback Form**

1. What services/support did you receive today? Please rate your satisfaction with each:

Service:	Rating:
	    

2. What (if anything) would you like to change?

3. How could you help to achieve make things better?

4. Please indicate how you feel about your progress:

Why do you feel this way?

5. How could the program adjust or adapt based on your progress?

Quarterly Review on Client Progress: Notes

Program beneficiaries progress at different rates. By taking time to reflect on the impact of the services you provide, you can gain new insights into what enables some beneficiaries to thrive while others continue to struggle – information you can use to adjust the way you provide care and support. @ACHIEVE, we want to help you to draw on lessons from those who are making the most progress so that you can have an even bigger impact in your community.

INTRO: These reflections help you to analyze service impact from the perspective of the beneficiaries who are making the most and least progress in the program – inviting you to identify changes that could increase the program impact.

TIME: 30 – 45 minutes

MATERIALS: Worksheet & pens.

ADAPTATIONS: This activity can be carried out with a peer who is providing the same services – talking through each question before you respond.

STEPS:

Reflection:

1. Find a quiet and private place where you will not be interrupted.
2. Read through the questions and give yourself time to think deeply about each one before answering.
3. Write your responses in the space provided, adding more pages if needed.

Connection:

4. Share your observations with others in the program, especially other Service Providers and your Line Manager. You can add this as an agenda item onto your regularly scheduled meetings.

Dialogue:

5. Discuss how you will use this information in your day-to-day work.
6. Ask questions to understand if others have made similar observations –

especially if they are serving the same beneficiaries, and see how you might be able to coordinate your efforts.

Action:

7. By taking time for reflection, you gain new insights into your achievements, and identify ways that you could adapt or change to be even more effective. Consider adding new and different questions to broaden your perspective and deepen your analysis.

NOTES: (MINI-VIEW)

Service Providers	
Tool for MM: Quarterly Review on Client Progress: Reflection	
Of all the clients in my caseload/group, which ones seem to be making the most progress:	Why are they progressing?
<hr/> <hr/> <hr/> <hr/>	
What can I learn from this?	
How can I use this information to help others who are struggling?	
Of all the clients in my caseload/group, which individuals/families seem to be struggling the most:	What is the goal for these households?
<hr/> <hr/> <hr/> <hr/>	
How could I better assist these individuals/families to meet their needs?	

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Tool for MM: Quarterly Review on Client Progress: Notes

Of all the clients in my caseload/group, which ones seem to be making the most progress:

<hr/> <hr/> <hr/> <hr/>	Why are they progressing?
What can I learn from this?	
How can I use this information to help others who are struggling?	

Of all the clients in my caseload/group, which individuals/families seem to be struggling the most:

<hr/> <hr/> <hr/> <hr/>	What is the goal for these households?
How could I better assist these individuals/families to meet their needs?	

Peer-to-peer Learning: Topics for Discussion

By setting aside time each month for a brief discussion with colleagues, you develop deeper friendships, and you support each other to have an even bigger impact in the community.

@ACHIEVE, we want to help you to grow your network so that you can take leverage the knowledge, skills, and experiences that are already accessible to you.

INTRO: This set of topics will help you to share and learn with other service providers.

TIME: 1 hour

MATERIALS: None.

ADAPTATIONS: These questions can be used to guide organization-wide peer-to-peer learning events.

STEPS:

Reflection:

1. Identify another service provider in the program and ask them if they would like to meet to share experiences.

Connection:

2. Explain that you have a list of discussion topics that you could use and review the topics together.
3. Choose one topic (one box) for your first session.

Dialogue:

4. As you discuss, be honest and open in your sharing and focus on practical ideas and solutions that you have seen or would like to try.

Action:

5. Let your colleague know how you have been touched by the conversation, and what you have appreciated most.

with others, consult your colleague before you close your session.

6. Try to set aside time each month to meet with a colleague, ideally the same person, so that you can encourage and learn from each other as you provide services in the community.

TOPICS FOR DISCUSSION (MINI-VIEW)

Service Providers

Tool for MM: Peer-to-peer Learning: Topics for Discussion

These questions² will help you to think deeply about your experience supporting clients & beneficiaries in the program. Using just one set of questions at a time, reflect on the questions and discuss with a colleague. Note: you can also write out your responses in a journal.

Learning from our Successes Think of the beneficiaries/ families that have been most successful because of your support. --- What do you think make this possible? --- Is there something particular about the way that you worked with these families?	Life as a Service Provider How has this experience as a service provider positively affected you? --- Your colleagues? --- How have your lives been changed?
Favourite Memories What are your favourite memories of supporting clients/beneficiaries? --- How did you make a difference in these situations?	Working with Others How are you working with the local leaders and other groups? --- What kind of things enable them to assist beneficiaries that you serve? --- How do you communicate with the local leaders?
Enjoying Our Work What do you enjoy most about working with families and communities in the program? --- How do you stay motivated? --- What advice would you give to a new staff/volunteer?	Best Performing Colleagues Which of your colleagues seem to be most successful in their work? --- What can you learn from their success? --- How might they be able to help you?

² These questions have been adapted from: 119+ Appreciative Inquiry Questions and Examples.

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If you would like to share any of the ideas or experiences you discussed

Tool for MM: **Peer-to-peer Learning: Topics for Discussion**

These questions³ will help you to think deeply about your experience supporting clients & beneficiaries in the program. Using just one set of questions at a time, reflect on the questions and discuss with a colleague. *Note: you can also write out your responses in a journal.*

Learning from our Successes

Think of the beneficiaries/ families that have been most successful because of your support.

What do you think make this possible?

Is there something particular about the way that you worked with these families?

Life as a Service Provider

How has this experience as a service provider positively affected you?

Your colleagues?

How have your lives been changed?

Favourite Memories

What are your favourite memories of supporting clients/beneficiaries?

How did you make a difference in these situations?

Working with Others

How are you working with the local leaders and other groups?

What kind of things enable them to assist beneficiaries that you serve?

How do you communicate with the local leaders?

Enjoying Our Work

What do you enjoy most about working with families and communities in the program?

How do you stay motivated?

What advice would you give to a new staff/volunteer?

Best Performing Colleagues

Which of your colleagues seem to be most successful in their work?

What can you learn from their success?

How might they be able to help you?

³ These questions have been adapted from: *119+ Appreciative Inquiry Questions and Examples*.

Theoretical Background & Evidence

In June 2021, ACHIEVE began a consultative process to identify needs, experience, and tools to for community-led monitoring (CLM) in OVC and DREAMS programming. This included the establishment of a Core Design Team with practitioners from 7 countries reviewing findings from a global survey, evidence from an expansive literature review, and a review of existing tools. Over a period of three months, the Core Design Team met nearly every week to review key lessons, share experience, and craft a vision for how CLM could be adapted, integrated, and sustained within their respective portfolio of programs. Furthermore, program beneficiaries, caregivers/parents, service providers and local leaders in Eswatini, Nigeria, and Rwanda participated in consultative meetings to share their experience and ideas for improving community voice, ideas, and inputs across the service continuum. Finally, over 120 stakeholders were engaged in a 4-country pilot which was conducted in August/September 2021. PACT gratefully acknowledges all these individuals who volunteered their time, ideas, and experience in the development of this Toolkit.

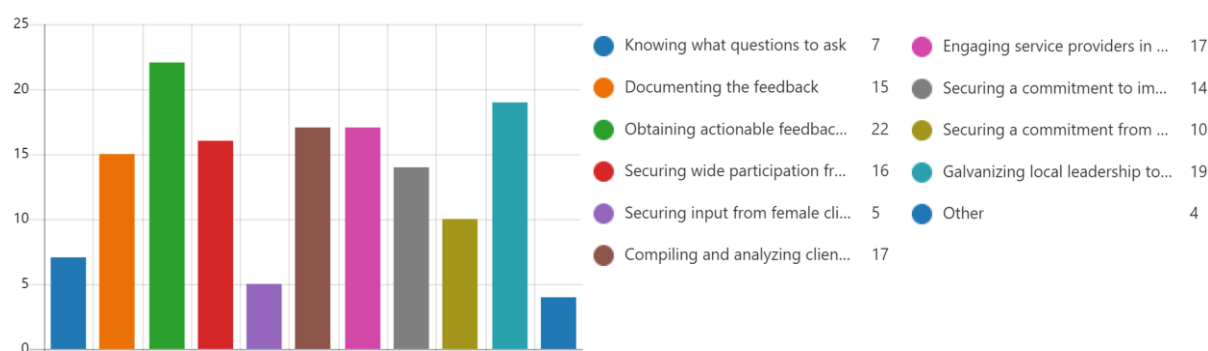
Drawing on Data, Evidence and Lessons from Community Monitoring

Guided By Data

In June 2021, ACHIEVE launched an online survey open to all OVC and DREAMS Implementing Partners. It included 14 questions to rapidly gather information on current approaches and tools for engaging communities in service quality monitoring, challenges, and recommendations, and was open for feedback over a two week period. The OVC Task Force played a key role in promoting and disseminating the survey, and a total of 42 stakeholders responded – with most of the responses (33 of 42) from Sub-Saharan Africa, followed by the Middle East/North Africa (5) and the Americas (4).

The survey revealed that OVC and DREAMS practitioners are already actively engaging communities in monitoring services – primarily through **day-to-day programming, observation, reflective sessions, and periodic inputs**. Key examples included: collecting information on beneficiary needs, service access, and outcomes during **program implementation** through the case management process, DREAMS reflective sessions, inputs from DREAMS Ambassadors, and implementing the Stepping Stones Curriculum. Furthermore, **organizational standards** also require community engagement and feedback throughout the project cycle, and **community system strengthening initiatives** and **beneficiary self-assessment tools** were also useful in monitoring services and outcomes.

Amid these efforts, the respondents also noted key challenges – with particular focus on the difficulties of **obtaining actionable feedback** (22 of 42); **galvanizing local leadership to build a culture of continuous quality improvement** (19); **compiling and analyzing client feedback/data** (17); **engaging service providers in a dialogue around service quality** (17); and **securing wide participation** (16)– see chart below.



Data Driving the Toolkit Design

The survey respondents provided practical suggestions regarding the language and tools to support widespread adoption and use. They highlighted the important role of the community and local leaders – especially during the design process, along with promoting and building a culture of reflection and learning that emphasizes beneficiary experience and ideas to improve service delivery and outcomes. These findings and recommendations were instrumental in developing the CLM theory of change – particularly the following elements:

- **Promote positive interactions across the service continuum:** focusing on engagement before, during, and after accessing services to proactively and immediately address issues affecting service quality, effectiveness, and impact.
- **Consider how social and cultural norms influence clients' ability to provide feedback:** recognizing the need to build confidence and readiness to share their ideas, perspective, and suggestions across all levels of the project coordinating and managing service delivery.
- **Emphasize mutual responsibility for service quality and success:** noting that services are delivered by volunteers who live in similar conditions as program beneficiaries, and that each have important knowledge, strengths, and assets to deploy to achieve the desired service outcomes.

Guided By Evidence

Over 40 publications were included in the literature review, although numerous other materials were reviewed to determine relevance. Using the following criteria, research, toolkits, and other guidelines were included if they were: (1) focused on CLM; (2) emphasized client/community leadership to improve service outcomes; or (3) shared best practice (or promising practice) linked to change in behavior or practice. The Literature Review thus drew on a broad sampling of resources and publications including CLM, social and behavior change (SBC), appreciative inquiry, continuous quality improvement, and community-led action.

Defining CLM

Across the literature, CLM was largely defined as a *mechanism, process, or practice whereby service users or local communities regularly gather, analyze, and use information to improve access, quality and impact of services*. Evidence-based advocacy and accountability was strongly emphasized in CLM, along with capacity building and resource allocation to sustain the practice. However, there was some variation across the literature over the role of the client and potential risks and consequences they might encounter if they are directly disseminating the data, and/or leading advocacy.

The following factors were identified as critical to CLM success, these can be loosely tied to the predominant steps or phases of CLM which include data collection; analysis and translation; engagement and dissemination; advocacy; and monitoring – see table below:

Key success factors across the phases of CLM:

① Data collection ② Analysis & Translation ③ Engagement & Dissemination ④ Advocacy ⑤ Monitoring				
Use predetermined tools --- Routine	Collaborative --- Strengthen community systems	Community-education --- Increase political will --- Joint ownership of solutions	Action-focused --- Increase accountability	Community leadership
Capacity strengthening / Community Ownership				

The origins of CLM are tightly bound to improving the quality of services and support to enhance HIV treatment continuity, with evidence of successful advocacy, especially among key populations. These achievements were attributed to community leadership, especially from people living with HIV and other key populations, in setting or clarifying standards of service, assessing capacity and performance against those indicators of quality, and demanding improvements in responsiveness, equity, and quality. It is perhaps not surprising then that CLM was typically conducted outside of the day-to-day implementation of the project and led by clients who sought data to advocate for improvements in the quality, equity, and availability of services. Likewise, the tone was typically adversarial, using data and client stories and experience to demonstrate where service providers and/or facilities presented barriers to services.

Evidence Driving the Toolkit Design

In the context of community-based services for OVC and DREAMS, services are provided by volunteers who live in similar conditions as the recipients of care and support, with limited remuneration, and with limited training and tools. These low-cost models rely on partnerships and goodwill to leverage the necessary resources to extend services and support at the community level. CLM for community-based services will thus need to be adapted to include a more collaborative approach, where clients - in this case, children, adolescent girls and young women, and their families – build energized and meaningful relationships with service providers and the wider community to mobilize and deploy their collective strengths, assets, and commitments to maximize service outcomes. As such, CLM in this context will brace the following elements:

- **Continuous Quality Improvement (CQI):** expanding the focus from service provider to include the system for service delivery - building an organizational culture for learning (through reflection) and engagement.
- **Appreciative Inquiry:** supporting a reflection practice that builds trust, engages the heart and spirit, and builds energized relationships, while also inspiring positive thinking and actions toward a shared collective vision of the future.
- **Social and Behavior Change:** focusing on the needs, perspective, and desires of both the beneficiary and service provider across the entire service continuum to inspire multiple overlapping efforts to achieve the best possible results.

Guided By Experience

Community needs and progress are regularly tracked and recorded during OVC/DREAMS programming. However, there are missed opportunities for consulting beneficiaries on their level of satisfaction with services, and possible adaptations due to improved or delayed outcomes. Furthermore, without the habit of requesting this type of feedback, and concerns about the need for more actionable feedback, more efforts will be needed to prepare communities to share their ideas – from the beneficiary through to the service provider – thus helping to build a culture for learning and engagement.

Experience Driving the Toolkit Design

In the context of OVC/DREAMS programming, practitioners can easily collect and use community feedback to adjust services and support, ideally during the actual service. By **establishing a culture of engagement**, from the Manager/Leader through to the client, individuals could be inspired to ask different types of questions of themselves and each other – helping each person go into services with **clear goals, ideas, and lessons to draw upon**. These types of proactive, and continuous efforts along the service continuum could have a lasting and sustainable impact on quality and impact of services.

SECTION 4

Opportunities for Innovation & Thought Leadership

With the development of this CLM(M) Toolkit, there are so many opportunities for innovation and thought leadership. Drawing on lessons from the four-country pilot, here are a few examples:

Suggestions Boxes:

- Providing translated copies of the **Feedback Form** (see page 11 of the Toolkit) next to the project's Suggestion Boxes will enable teams to collect more targeted information to guide program improvements.

Monthly Verification Visits:

- Integrating CLM(M) tools during these monthly visits will enable the project to collect feedback on client satisfaction, and possible suggestions for improvement. Suggested tools include **Feedback Form** and **Seeking Meaningful Feedback** (see page 11 and 24 of the Toolkit).

Peer-to-Peer Learning

- Many projects do not have a structured approach for supporting and promoting peer-to-peer learning. The **Dialogue Prompts** (see page 38 of the Toolkit) provide simple and practical ways to encourage experience sharing within the program.

In addition, during the development of the CLM(M) Tools, the team gained new knowledge and insights into ways that technology could support and strengthen the roll-out.

Integrate key elements of the CLM(M) Tools into existing project platforms:

- One project has added some of the questions from the **Feedback Form** (including the emojis) to their Mobile Application (CommCare). They will soon have real-time data to monitor beneficiary satisfaction with services.

Use What's App to build community and facilitate information sharing

- The Toolkit Core Design Team established a What's App group to support communication across the different countries. It proved to be a helpful way to celebrate progress, as well as keep members informed about new opportunities and developments.

YouTube Videos

- The Toolkit Core Design Team established a YouTube Channel with a vision of providing easy access to videos on CLM(M) (including local language materials), and stories of success. The members also identified the benefit of having animations to introduce the CLM(M) tools to youth, but there was not sufficient time and capacity during the process to fully embrace these ideas.

Finally, there are many opportunities to develop abstracts based on the learning from the Global Survey, the Literature Review, and the adaptation of CLM(M) to the OVC and DREAMS context. As the roll-out begins in October 2021, there will be countless new learning based on the feedback, information, and improvements that are generated through the application of the tools.

SECTION 5

Working with People who are Low-Literate

Drawing on lessons from the pilot, some individuals with limited education faced challenges responding to questions that required critical reflection or invited solutions or adaptations to service delivery. With the goal of supporting an inclusive approach to CLM(M), consider the following adaptations to make these tools more accessible.

My Plans, Progress & Commitment: Journal Pages

Gather the group, parents/caregivers with low-literacy in one group and youth with low-literacy in another group. Do not distribute copies of the forms, but instead support a project staff member or volunteer to use the questions to facilitate discussions in pairs or in small groups. Consider pausing after discussing the questions on the first page to invite the members to share with the larger group; then pausing again after discussing the questions on the second page.

Before, During, and After Services: Worksheet

This tool could be integrated into a project event or group-based service, engaging all the members, both literate and low-literate. In this case, the service provider could invite the members to discuss in small groups their goals for the session and the questions they would like to ask, then invite people to share in plenary. The service provider will want to remind the members that they can raise personal and confidential questions at anytime individually with him or her to protect their privacy. Then during the actual session, and at the conclusion, the service provider could pause to invite members to share key things that they will remember from the session, stories/informed that touched them, and key actions they would like to take because of the session. In this case, the members would not require copies of the Tool and would not need to record their responses on paper.

Appreciating Good Services: Reflection

This tool lends itself well to a facilitated discussion among members receiving group-based services. Due to the focus on the qualities and impact of different service providers, consider inviting a member of the group to lead the exercise. Also, emphasize opportunities for sharing feedback or appreciation that do not involve written text.

Feedback Form: Questionnaire

While most young people appreciate the emojis on this tool, the images can be confusing to some individuals. In this case, offer symbols such as stars, or a numbered scale from 1 to 5.

Helping Youth People to Communicate: Ideas

This tool is quite text-heavy, yet the information is useful and relevant to all caregivers and parents. Consider ways that members could be invited to role-play the different scenarios, modeling how they could use some of the phrases as they engage with one of the children in their household. To support recall, it may be helpful to use only one role play/session. Also, it may be helpful to invite the members to practice using each of these phrases with a partner during the session – something that will help them to appreciate the positive feelings and impact of using these types of positive reinforcement.

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