**Tool D**

* **Staff and volunteer activity record**
* **Programme monitoring templates**

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| Staff and volunteer activity records |

Staff and volunteer activity records document activities completed during the course of implementing a project. They help to ensure that all activities related to the programme are recorded. The format for recording staff and volunteer activities can be adapted to your programme and the actual activities that are implemented. For example, activities may include home visits, community meetings, provision of oral or written psycho-educational material, referrals, etc. You may want to create a format that captures specific information about:

* Identifying details: name of staff or volunteer carrying out the activity, date, location, objectives
* Activity implementation details: what was done, in what time frame, who was involved
* Observations and lessons learned: successes achieved, challenges encountered and how they were resolved, new issues identified
* Plans for follow-up

Staff and volunteers may benefit from a workplan that provides them with an overview of activities that they will be implementing. For example:

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| **My Workplan** | | | |
| Date & Time | Activity/Event | Place | Participants |
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An activity record then provides details about activities once they have been implemented, outcomes and any follow-up planned. A sample activity record format is provided below. An activity record can be filled out on a regular basis depending upon the time frame of the project and when and how activities are implemented. For example, it may be useful to compile information on a weekly or monthly basis. Be sure to adapt the format to your specific programme’s activities. For example, if working with children of different age groups within the programme, consider disaggregating the data recorded for “number of participants/people reached” accordingly (e.g., 0-12, 12-18).

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| **Sample Staff and Volunteer Activity Record Format** | | | | | | | | | |
| Name of Staff or Volunteer: | | | | Date: | | | | | |
| Time frame of record: | | | | Project details (name, location): | | | | | |
| Sample Activities *(adapt to your programme and add additional activities as needed)* | Number completed *(e.g., # of home visits, lay counseling sessions, referrals)* | Date  completed | Description *(e.g. purpose of home visit or group meeting, type of referral, types of psycho-educational materials distributed)* | | Number of participants/ people reached | | | | Outcomes/  comments/  follow-up plans (if any) |
| Men | Women | Boys | Girls |
| Home Visits   |  |  |  | |  |  |  |  |  |
| Community awareness sessions   |  |  |  | |  |  |  |  |  |
| Psychological First Aid   |  |  |  | |  |  |  |  |  |
| Referrals   |  |  |  | |  |  |  |  |  |
| Lay Counseling   |  |  |  | |  |  |  |  |  |
| Psycho-educational material distributed   |  |  |  | |  |  |  |  |  |
| Other activities… |  |  |  | |  |  |  |  |  |
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| **Provide additional information as relevant**  *(examples provided below, adapt to your programme)*: | | | | | | | | | |
| Topics discussed during [home visit, group meeting, lay counseling session, etc.]: | | | | | | | | | |
| Further description of stakeholders or beneficiaries participating in [group meetings] or reached by the activity [PFA]: | | | | | | | | | |
| Observations and lessons learned: | | | | | | | | | |
| I need support for [include activity-related and/or personal support]: | | | | | | | | | |
| Follow-up plans: | | | | | | | | | |

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| Programme Monitoring Templates |

Two sample formats are provided for programme managers or PS delegates conducting programme monitoring. These include:

* Monitoring visit report format[[1]](#footnote-1)
* Monthly activity report format

Data collected from staff and volunteer activity records also informs these programme monitoring reports. For example, when conducting programme monitoring visits, managers and PS delegates will review the staff and volunteer activity records to see what has been done. During the monitoring visit, they may also visit the programme and project sites (e.g., CFS in refugee camps); talk with staff and volunteers, beneficiaries and stakeholders; note general observations and generally conduct quality assurance of the programme. The monitoring visit is also used to provide supervision and support to PS staff and volunteers.

The monthly activity report compiles information from various sources, including the staff and volunteer activity records and monitoring visit reports. It provides an overview of activities implemented each month, including lessons learned and future plans.

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| **Sample Monitoring Visit Report Format** | | | | | |
| **Visit Details** | | | | | |
| Completed by: | | Location: | | | |
| Date: | | Objectives of the visit: | | | |
| **Agenda**  The following activities were completed as part of a monitoring visit: | | | | | |
| Date | Time | Activity | | | Participants |
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| **General Observations**  Record your general observations from the monitoring visit below. This may be a few paragraphs up to a few pages. Include photos, case studies and quotes to illustrate your points. | | | | | |
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| **Specific Issues and Actions**  List the specific issues/problems that were identified during the visit. Then identify the actions that need to be taken to solve the problem. This should include the specific individual responsible for taking the action, and when it should be completed by. | | | | | |
| **Issue Identified**  ***Example:*** *During the psychosocial training activity that we observed on the 6th January 2014, local trainers had some questions about the IASC MHPSS guidelines.* | | | | **Actions to be taken**  ***Technical Advisor:*** *Organise a briefing session for local trainers by 30/02/2014 on the IASC MHPSS quality guidelines. Provide ongoing coaching to help them implement the guidelines.*  ***Program Manager:*** *Ensure all PS trainers understand and follow IASC MHPSS guidelines by 30/03/2014 and verify through supervision visits.* | |
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| **Next Visit**  Provide details of the next monitoring visit. The objectives of the next visit should match the issues and actions identified in this visit. For example, if the quality of activities is an issue, then the next visit should observe those same activities to make sure the quality has improved. | | | | | |
| To be completed by: | | | Location: | | |
| Dates: | | | Objectives: | | |

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| **Sample Monthly Activity Report Format**  *Data is compiled into this monthly activity report from the staff and volunteer activity records and monitoring visit reports, as well as other sources.* |

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| **Identifying Details** |  | |
| Completed by: | Place: | Dates (month): |
| **Executive Summary** | | |
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| **Activities Implemented during the Month**  The following templates can be used to compile and record various types of PSS interventions and activities. Utilize those templates relevant to your current programme, adapt as necessary. |

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| **Trainings Facilitated** | | | | | | | |
| Date | Location | Number of Participants | | | Topics covered | Duration | Facilitators |
| M | F | Total |
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| **Psychological First Aid Sessions Provided** | | | | | | | | |
| Date | Location | Number of People | | | | Topic | | Comments |
| Men | Women | Boys | Girls |  |  | |
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| **Community Outreach Activities** | | | | | | | |
| Date | Location | Number of Participants | | | | Topics discussed/activities conducted | Comments |
| Men | Women | Boys | Girls |
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| **Child Friendly Activities** | | | | | | | |
| Date | Location | No. of Children | | | No. of Sessions | Activities | Comments |
| M | F | Total |
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| **Referrals** | | | | | |
|  | Reason(s) for referral  (please list examples) | Gender/  Age of person(s) referred | Date of Referral | Referred by [staff/  volunteer] | Referred to  [organization, community protection committee, clinician, legal service, health clinic, etc.] |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
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| 4. |  |  |  |  |  |
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| **Community Meetings** | | | | |
| Dates | Location | Agenda | No. of Participants | Outcomes |
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| **Challenges** |
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| **Lessons Learned** |
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| **Recommendations** |
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| **Plans for coming month(s)** |
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1. Adapted from: M&E package for Health Emergency Response Unit, psychosocial component. IFRC (pending publication) [↑](#footnote-ref-1)