# Tool K - Supervision reporting tools

This section contains tools and guidance for supervision of staff and volunteers involved in PS programmes. Supervision involves ongoing support to PS programme staff and volunteers in continually developing their skills and knowledge, confidence in fulfilling their role in the PS programme, and for performance evaluation reports.

* Sample supportive supervision checklists
* Sample Activity/Field Visit Supervision Checklist
* PS team meeting report guidance
* Sample staff/volunteer capacity building record

Supervision is usually provided by PS programme managers or PS delegates and occurs in various ways, for example:

* On-the-job coaching and feedback
* Mentorship in PSS and VP/protection interventions
* Commenting on a report or guidance in using data management tools
* Regular team meetings and case study meetings
* Individual supportive supervision

Supervision is also closely linked with caring for the wellbeing of staff and volunteers. Effective PS programmes depend upon the wellbeing of staff and volunteers. Informal and formal supervision sessions provide the opportunity to check in with staff and volunteers to determine their support needs, ensure a supportive working environment, address any team conflicts or issues and address the need to shift roles or work tasks to best support staff and volunteers and ensure safe and effective programme implementation. Specific tools for caring for staff and volunteers can be found in Section 10 of this toolbox.

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| Sample supervision templates |

Individual staff and volunteer progress evaluation and general supervision occur at regular intervals to monitor staff performance, achievements, challenges and wellbeing. Depending upon the needs of your programme and team members, you may choose to conduct these yearly or more often. Two sample templates for supervision are provided:

1) Sample staff/volunteer progress template: The following sample templates are used to document progress conducted together with the staff member or volunteer. It is an opportunity to discuss progress in work performance on the programme, note key achievements, as well as identify areas for improvement. It is also an opportunity to determine any support needs the staff or volunteer may have, in terms of their personal wellbeing or needs for further training or supervision to meet their work objectives. The PS manager can work through this report template together with the staff or volunteer, if useful, but the final report is made by the PS manager and may also include a confidential section to be filled out by the manager alone.

2) Sample general supervision checklist: This is used for documenting general supervision of staff and volunteers. This template is filled in by the PS manager alone.

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| **Sample staff/volunteer progress template** | |
| Name of staff/volunteer: | Date: |
| Programme: | Programme manager: |
| Programme location: | Staff/volunteer role or title: |
| Notes from previous progress report: | |

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| Staff/volunteer programme progress update | | | | |
| Staff/Volunteer Work Objectives | Progress update (include dates) | Key findings/ issues | Next steps | Date due |
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| Staff/volunteer progress evaluation questions: | Needs improve-ment | On track | Exceeds expect-ations |
| Roles and tasks:  1. Is the staff/volunteer able to perform the tasks expected in their role in the programme?  Comments: |  |  |  |
| 2. Is the staff/volunteer achieving programme milestones on time?  Comments: |  |  |  |
| 3. Does the staff/volunteer demonstrate confidence and competence in their PS and VP/protection skills and knowledge?  Comments: |  |  |  |
| 4. Does the staff/volunteer demonstrate a good working relationship with team members?  Comments: |  |  |  |

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| Summary and next steps |
| Key achievements: |
| Areas for improvement and goals: |
| Next steps for improvement and to realize goals (e.g., professional development or training activities to increase PS skills and knowledge, PS programme implementation plans): |
| Support and referral needs: |

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| **Sample general supervision checklist for PS managers**  *Adapt the following to your programme(s) and reporting cycle.* | | | |
| **Name of manager:** | **Reporting dates: \_\_\_\_\_\_ to \_\_\_\_\_\_\_\_** | | |
| **# of programme staff supervised**:  (where relevant, list various programme sites) | Men | Women | Total |
| **Types of supervision provided** (and # of sessions):   * On the job coaching #\_\_\_\_\_\_\_ * Mentorship #\_\_\_\_\_\_\_\_\_\_\_ * Individual supervision sessions #\_\_\_\_\_\_\_\_\_\_\_\_ * Case study supervision meetings #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Team meetings #\_\_\_\_\_\_\_\_\_\_ (how often held? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_) * Performance management and evaluation sessions #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Direct observation of staff/volunteer performance #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Elaborate on supervision provided including context, staff and volunteers supervised, etc.: | | |
| **General findings from supervision and direct observation:** (where relevant, list various programme sites or fill in separate templates if reporting on multiple sites, or multiple types of PS programme activities) | | | |
| **Recommendations and next steps:** (include training and capacity building recommendations, strategies to support staff and team wellbeing and functioning, any recommendations to change staffing or roles, etc.) | | | |

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| **Sample Activity/Field Visit Supervision Checklist**  *Adapt the following questions to your particular programme and the type of supervision visit provided (field visit, general supervision of PS activities, etc.)* | | | | | |
| Name of staff/volunteer | Name of PS manager: | | | | |
| Date of visit: | Time: from\_\_\_\_\_ to \_\_\_\_\_ | | | | |
| Community or programme visited: | | | | | |
| Activity/event observed: | | | | | |
| Objective of activity/event: | | | | | |
| **Key Observations and Comments** | | **Strongly disagree** | **Disagree** | **Agree** | **Strongly**  **Agree** |
| 1. Activity organized as planned  Comment: | |  |  |  |  |
| 2. Participants (beneficiaries) attend the activity as per expected level  Comment: | |  |  |  |  |
| 3. Key messages delivered correctly  Comment: | |  |  |  |  |
| 4. Level of participation of beneficiaries  Comment: | |  |  |  |  |
| 5. Volunteer/staff ability to convey enthusiasm and motivate participants  Comment: | |  |  |  |  |
| 6. Volunteer/staff ability to relate well with participants (e.g., good communication skills, warmth, empathy)  Comment: | |  |  |  |  |
| 7. Volunteer/staff demonstrated ability to carry out tasks according to their role (e.g., direct PS support to beneficiaries, PFA, psycho-education, group or meeting facilitation)  Comment: | |  |  |  |  |
| 8. Volunteer/staff ability to work effectively with others in the team  Comment: | |  |  |  |  |
| Volunteer/staff strengths: | | | | | |
| Volunteer/staff areas for improvement: | | | | | |
| Supervision/support provided: | | | | | |
| Recommendations and next steps (e.g., further training, supervision): | | | | | |

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| PS team meeting report guidance |

Team meetings are useful times to provide supervision and support to staff and volunteers involved in the programme – in addition to updating programme progress, troubleshooting and planning. Regular team meetings provide structure for staff and volunteers and an opportunity to discuss challenges and achievements in their work in the programme. They afford team leaders the opportunity to gauge gaps in skills and knowledge among PS programme staff and volunteers, provide guidance to overcome challenges, appreciate individual and team efforts, and emphasize good self and team care strategies.

Team meetings are most effective when held at a consistent day/time, and when they follow a clear agenda and time limit. How often, where and when you hold team meetings will depend upon the needs of your particular programme. In emergency situations, team meetings may be held on a daily basis given that the situation may be rapidly changing and staff and volunteers may require extra support and attention to their wellbeing. In other situations, team meetings may be held weekly or bi-weekly, for example. The length of team meetings also depends upon our programme needs, but is often between 30 minutes to 1 hour.

Team meeting reports should be concise and provide an overview of programme implementation, staff and volunteer achievements and challenges, team issues (including issues relating to team dynamics, roles and responsibilities) and next steps. Consider the following topics and steps in designing your team meeting agenda and report format:

* General information: record the date, programme title, name of manager or other person completing the report, team members present (numbers, names)
* “Old business”: review the issues and ‘next steps’ outlined in the previous meeting report to monitor if they have been resolved or are ongoing
* “New business”: list any topics for the agenda that need to be covered in the meeting. Before the team meeting, the manager outlines a basic agenda of topics, and then team members are invited to add other items that they would like to discuss. Topics should relate to the implementation of the programme, including achievements toward targets, challenges and troubleshooting.
* Review each topic in turn, and take notes on the discussion, questions or challenges encountered by team members, support and supervision provided, decisions taken and follow-up planned.
* Next steps: Outline a list of next steps for follow-up, including who is responsible for each task and a time frame for their completion.
* During the team meeting, the manager supports, encourages and acknowledges team members’ efforts.