

# Family Development Programme

Subject	PROCEDURE		
Project	<b>HOME VISITS ACTIVITIES</b>		
Topic	STANDARD PROCEDURE AND RECORD KEEPING		
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### **Abbreviations**

COD	Coordinator
INC	In Charge
FDP	Family Development Programme
GC	Guidance Centre
HV	Home Visits
PO	Phase-Out
SUP	Supervisor
SW	Social Worker/Field worker

## **A] OBJECTIVES OF THE DIFFERENT STEPS IN FOLLOW-UP**

Reminder of **FDP Home Visit Flow Chart**

⇒ See Full Form in Annexure N°10

### **1. Objectives of Survey Visit**

- To identify potential families for future selection
- To assess initial needs of families, mainly by observation ("questioning approach should be strictly limited to basic administrative info such as names, family composition, employment and education situation)
- To introduce SW and FDP

### **2. Objectives of Selection Meeting**

- To discuss identified needs of the family
- To assess whether the families should be enrolled in the program depending on their needs
- To determine what urgent problems the family needs to address

### **3. Objectives of Permission Visit**

- To explain them the procedure of FDP and to assess their willingness of being involved in the programme
- To get the permission of the family to start Regular Home Visits (If the family agrees, this Permission visit will be recorded as the First visit of the Observation period)
- To identify with the family their objectives (easily expressed by the family)
- To get more detailed information about the family situation,

### **4. Objectives of Observation Period**

- To observe the family's situation and attitude before starting a deep work with the partner, focusing more specifically on :
  - o Collecting more information about the family (origin and culture, composition, history, financial resources, strengths and weaknesses...)
  - o Assessing its awareness level, especially on Health, Education and Budgeting
  - o Understanding the family relationships (internally and with neighbours & community)
- To observe the family's motivation and reaction while working on the first selected and agreed objective.

- To focus primarily on initiating a relation of trust with the family. At the end of the Observation Period, to estimate on the basis of observations:
  - o How long the family needs to be followed up?
  - o Which frequency of visits is needed (once a week, more?)
  - o Which objectives can be set with the family?

## 5. Objectives of Regular Home Visits

- To nurture the confident relationship between the family and SW,
- To provide the family with proper information & referrals related to their objectives,
- To encourage the family's motivation in improving their situation and achieving their objectives,
- To support the family facing difficulties while working with them

The final objective consists in **building up the self-confidence of the family.**

## 6. Objectives of Group discussion or Photo phase out activity

The month of the phase out, the families are gathered for Group discussions and the Phase Out Photo Activity.

- To Identify selected objective/s and Evolution or change felt by the in Family by working on the objective
- To assess if the family appreciated FDP and its process and will be interested recommending other families of the community
- To assess sustainability of the family- what are their dreams, what do they want to do, how do they feel

## 7. Objectives of Phase-Out Meeting

The PO meeting first aims at deciding for each family, from the information gathered in second last visit whether FDP team should stop the regular home visits with the family or not.

If the decision is made to stop the FDP work with a family, then the meeting enables to decide about the phase-out grade of the family and about the date of the next follow-up visit (Evaluation visit).

The PO meeting also helps in writing success stories as well as difficult stories.

## 8. Objectives of the Bye Bye Visit and Phase out Evaluation visit

This visit is conducted **to assess the following 4 points** in order to prepare for phase-out meeting:

- Achievement of objectives.
- Evolution of family's self-confidence and motivation throughout the accompaniment.
- Family's ability to solve their own problems in future.
- Family's satisfaction about the service provided by the team.

This visit also allows us to

- To give recognition to the family's involvement and motivation
- To acknowledge objectives achieved by the family
- To inform about Guidance centre in the area if needed in the future
- To thank the family for their cooperation and wish them all the best

## 9. Objectives of the **Evaluation Visit**

- to assess whether the family has maintained their objectives,
- to know if the family has been able to achieve other objectives after PO,
- To compare the family's situation (in terms of motivation, confidence) after PO with their situation during regular home visits.

Following this visit, Family will be regarded following same criteria as for the PO meeting (see Annexure).

## B] ACTORS AND ACTIONS

Trigger/ Frequency	Actors	Actions	Particular
<b>1. Survey Visit</b>			
To be conducted regularly / ongoing process* (while carrying out regular Home Visits to other families, *when there are expected PO families)	Main SW + Observer*	Introduction	Your name & position Your Organisation
		Inform about FDP objectives	Explain FDP goal and the way the programme is being conducted (Home visits, free guidance, referral, No charity...)
	Main SW	Explain why a survey is needed	Take the permission from the family for Survey
If family gives permission for survey	Main SW	Ask questions / facilitate family expression + Observe Identify objectives	Fill <a href="#">Family Survey Form</a> or take brief notes in the diary.
End of the day, at office, in case of family has given permission Back to the branch office	Main SW + Observer*	Complete Family Survey Form	Add/correct names,, address/land marks, special remarks if needed
		Update SW diary	Note down actual visits paid (family names) on <a href="#">SW diary</a>
		File forms and Sort families according to needs	File <a href="#">Family Survey Form</a> in SW " <a href="#">Survey Forms Folder</a> ". Prioritize the one(s) SW will present to next " <b>selection meeting</b> "
End of the day, at office	Main SW	"recommended" Update map of area	"recommended" Note down "survey refused " or "surveyed" houses on <a href="#">map of area</a>

**Main Social Worker** is the SW who will deal with the family in the future and who will pay regular visits to that particular family. This term is used only during survey to avoid confusion with the Observer who can be a SW also.

\***Observer** for survey visit is either another SW or an In Charge/Supervisor

Trigger/ Frequency	Actors	Actions	Particular
<b>2. Selection Meeting</b>			
Regularly Minimum twice a month per Branch/area	Area/branch team with minimum Main SW + Observer+ INC/Sup. Coordinator if possible	Review all surveyed families	Review <a href="#">Family Survey Form</a> SW shares views with team (Needs, observations, identified objectives, etc...)
		Decide which families to enrol	Prioritize families with emergencies
Selected Families	Main SW	Create Family File	File <a href="#">Family Survey Form</a> in SW " <a href="#">Selected families Folder</a> " Create Family Observation Form
		Update SW diary	Plan Permission Visit with INC/Sup & write day in <a href="#">SW diary</a>
Not selected Families	Main SW	File Family Survey Form	File Form in SW " <a href="#">Not selected Families Folder</a> "

### **CRITERIA of selection of a Family in FDP Home visits**

The families targeted by FDP are the poorest ones, who are most often not capable to respond to their own needs by themselves. It is very difficult for these families to plan actions, to anticipate difficulties; they often wait until the last minute before looking for help in order to respond to emergency, when the situation is already critical (health is a common example).

Experience shows that very deprived families are often able to clearly ask for help and to show a huge involvement in the home-based counseling with the staff.

#### **Generally, 2 types of target families are identified by FDP teams:**

- (1) Families who need support in order to identify their own difficulties and needs, and to avail the existing services.
- (2) "Priority families", who are particularly at risk as they are facing life-threatening situation (serious health problems), exposure to abuse / violence, certain types of psychological difficulties and other psychosocial issues. These families are closely monitored by SW with the on-going support of INC/SUP and other technical staff.



Trigger/ Frequency	Actors	Actions	Particular
<b>3. Permission Visit</b>			
After selection meeting (while carrying out the Regular Home Visits to other families)	Main SW, INC/Sup & Family	Visit the family's house	Remind the family about Survey visit & about the identified objectives. Remind the family of the importance of its motivation
		Inform about FDP methodology	Explain FDP process to the family (i.e. Regular HV frequency, etc.) & other services provided by the organisation. Give GC leaflet.
	Main SW, INC/Sup & Family	Explain of the action plan and priorities / objectives.	Test the willingness of the family to work with FDP. Take the permission from the family for Regular HV.
If family gives permission	Main SW, INC/Sup & Family	Fill up Family Observation Form	Fill <a href="#">Family Observation Form</a> , <b>select with family 1 "simple but important"</b> among identified objectives for an initial in average 1-1.5 month's Observation period
End of the day, in case of permission Back to the branch office	Main SW writes, INC/Sup. checks	Write in <a href="#">SW diary</a> Permission Visit	Names of the family visited, date of visit, special remarks
		Write down the permission date	Write the permission date on the <a href="#">Family Observation Form</a> and put the symbol "A" (i.e. Agreed) against the objective the family has agreed to work on.
		Enter in Master Register	Make entry of the forms in <a href="#">SW Master Register (manual)</a> <small>See Note 1</small> The identified objectives are recorded in sequence as per the importance and priority of the family to their objectives.
		File Forms	File the (survey + Observation) forms in the " <a href="#">Family file</a> " and place it in the " <a href="#">Ongoing families Folder</a> " and
		update map of area and SW diary	Plan the regular HV in <a href="#">SW diary</a> .
In case of no permission		File the forms in " <a href="#">Permission Visit Rejected Folder</a> "	File <a href="#">Family Survey Form</a> in the binder and informs the INC/Sup. in next PO/Selection meeting.

Note 1

📄 A **Family register number** will be given by IA SMART after encoding. It is a unique N° per Branch. This Reg. Number will have to be written both on all consecutive Forms and registers.

Trigger/ Frequency	Actors	Actions	Particular
<b>4. Observation Period</b>			
For the first 5 to 7 visits (in average 1 to 1.5 month)	Main SW & Family	Follow the family	Visit the family to build-up the relation with them. Follow the family to make them understand their first objective (selected in priority).
After every visit Back to the branch office	SW	Fill in the Family Observation Form	Enter in the <a href="#">Family Observation Form</a> : - the date of every HV, - The observation remarks about the family (motivation, their relation towards SW, their expressed needs, etc.)  Record every HV in SW <a href="#">Master Register (manual)</a> as well.
<b>Observation Conclusion meeting</b> <i>(only the families whose Observation Period is finished are considered)</i>	Main SW, area/branch team, Observer, INC/Sup. Coordinator if possible	Discuss on the Observation Period	Sum up the Observation Period by going through the Family Observation Form. <b>Decide whether the family needs further HVs</b> ▪ <b><u>If Yes</u></b> : Estimate & decide how long the family needs to be followed, how many HVs need to be made per week depending on the objectives to be tackled in the following HVs & family response. Prioritize the objectives (Plan of action)  ▪ <b><u>If No</u></b> : <a href="#">Phase Out</a> the Family (See 6.) and give a Grade  Refer to Guidance Centre if needed; In that case, update the Master register in column GC, do not fill any grade.

Trigger/ Frequency	Actors	Actions	Particular
<b>5. Regular Home Visits</b>			
If several objectives	Main SW	Deal first with <i>easy</i> but <i>urgent and important</i> objectives that are acknowledged and decided by the family and SW to be solved first.  Then go into more difficult objectives, as the confidence goes up.	Priorities / Objectives defined in action plan are tackled in different visits according to their priority.  <i>We recommend to prioritize objectives before each HV and to tackle only a limited number per visit (ideally no more than 2)</i>
Home Visits (Minimum 4 times a month/ family)	Main SW	Build rapport with family and make the family at ease	How are you, your children, your health, what are you doing, etc. and then attract the attention of the family towards their difficulties; motivate and guide them to act on their objectives related to these difficulties?
At the end of each HV	Main SW	Intimate the family about the next visit day  Give "tasks"	Suggest a day, give details about timings and how to get there (costs, public transportation, etc.....).  Help the family to plan what has to be processed before next visit: inform the family to which service provider to go, giving priority to public providers).
If the family is referred to other NGO internal services (GC, Health Clinic, etc.)	Main SW		Ask the family to come to GC. Give the family GC address and timings + leaflet.
If the family is not at home	Main SW	Re plan Visit	Make the visit afterwards or on other day.
During the visit	Main SW	Note visit information	Note in the <a href="#">SW diary</a> or notebook summary of the visit.

## Regular Home Visits (Follows)

Trigger/ Frequency	Actors	Actions	Particular
Back in the Branch Office after Home Visit	Main SW	Update Family forms with summary of the day.	<p>Write down on the <a href="#">Family Follow-Up Form</a> the motivation of the family, its relation with the SW, new difficulties expressed by the family or identified by SW during the visit.</p> <p>These new "objectives" are also recorded in the Master Register as well as in the <a href="#">Family Follow-up Form</a>, as needs to be addressed afterwards.</p> <p>Every HV is recorded in the <a href="#">Family Follow-Up Form</a> by putting in front of the objectives symbols like</p> <p style="text-align: center;"> <b>S – Sensitisation</b>  <b>A – Agreement</b>  <b>B – Building-Up</b>  <b>P – Process</b>  <b>C – Completed</b>  <b>U – Unachieved</b>  <b>I – Impossible</b> </p>
If the objective is achieved	Main SW, INC/SUP Family	Motivate the family for achieving next objective	Congratulate family for achieving their objectives and motivate them for opening up on other difficulties and completing next objective.
			Put symbol "C" on the <a href="#">Family Follow-up Form</a> . Write the date of achieved objective in the Master Register.
If the case of the family is particularly difficult	Main SW, INC/SUP Family	Organize a <b>support visit</b>	Main SW shares the case with INC/SUP before visiting the family. After common home visit, a debriefing is made and a new Plan of action is set. If needed, the case can be submitted to the entire team for additional inputs.
If the difficulty is such that it cannot be tackled internally	Main SW, INC/SUP	Reference to other NGOs/Service Providers	Refer the family to other NGOs/Service Providers through referral letter.
"recommended" FDP weekly meeting	Main SW, INC/SUP	SW sums up situation and achievements of all ongoing families	INC/SUP advises the Main SW, Checks and appreciates the method
Branch meeting (Twice a month)	Coordinator INC/SUP, all SWs	Success/difficult cases	Discuss difficult stories and success cases. Analyse.

Trigger/ Frequency	Actors	Actions	Particular
<b>6. Group discussion or Photo phase out activity</b>			
<p>If all objectives completed</p> <p>If not, but if good confidence and ability of the family to achieve their objectives</p>	Main SW & INC/SUP Family	Main SW tells In-Charge about families who could be phased out this month	<p>SW Present cases to the INC/SUP.</p> <p><b>Families are visited with INC/SUP for Second Last visit</b> to assess whether the decision to Phase Out the family should be actually taken. The family is informed about the goal of the visit and encouraged to participate</p>
<p>If there is not enough confidence or not enough motivation</p>	Main SW & INC/SUP Family	Intimation about Phase Out	<p>Family is intimated about its Phasing Out. <b>No PO Form is filled</b>, but the family case will be taken in the PO meeting.</p>
<p><i>"recommended"</i></p> <p>Phased out form is filled</p>	SW, In-charge, Family	<p>Sum up achieved objectives to build up confidence of the family.</p> <p>Assessment of family situation, attitude and check its confidence</p>	<p>Informal introduction</p> <p>SW asks the questions to the family and writes the answers given by family in the <a href="#">Phased Out Form</a>.</p> <p>From observation, answers to informal questions asked and how the answers are given In-Charge assess the confidence, attitude of the family and its relation with the Main SW.</p> <p>In-Charge appreciate / congratulate the family for its achievement and intimate about its Phase Out and Evaluation Visit after 6 months.</p> <p>Family is also suggested to visit Guidance Centre in case of any difficulty. Family is given the address &amp; Tel. Phone Number of the Guidance Centre.</p>

Trigger/ Frequency	Actors	Actions	Particular
<b>7. Phase Out meeting</b>			
Phase-Out meeting (minimum twice a month)	Area/branch team with minimum Main SW + Observer+ INC/Sup+ Coordinator	Make PO decision	<p>Review all cases one by one.</p> <p>Main SW informs the participants in details</p> <ul style="list-style-type: none"> <li>About the objectives that were identified and about the achieved ones.</li> <li>About family's motivation, their activeness, how Main SW dealt with the family and how family dealt with their objectives.</li> </ul>
If family is decided to be phased-out		<p>Discussion <b>about</b> grade (++, +, =+, =, NA) for PO according to family's attitude, to relationship with Main SW and to the sustainability</p>	<p>Main SW proposes a grade and Coordinator looks for <b>a team consensus on the final grade</b> agreed upon (++, +, =+, =, NA).</p> <p>Please see the annexure for the <a href="#">parameters to be considered while assigning the grade</a>.</p> <p>Sometimes the family is also put in <b>Stand-by</b> (see point 9), if the family is not available, whether Main SW has been informed about it or not.</p> <p>These families are recorded in a separate <a href="#">Stand-by Folder</a>. Such families are put aside from the regular follow-up for <b>maximum 2 months</b>.</p>
When family has been PO and graded	Main SW, INC/SUP	Update the SW <a href="#">Master Register</a>	<p>The Main SW, in <a href="#">the Master register (Manual)</a></p> <ul style="list-style-type: none"> <li>Fills per family concerned the PO date and the grade given.</li> <li>Ensures that starting date, total Nb of visits, objectives selected and objectives achieved are properly mentioned and exact.</li> </ul> <p>INC/SUP checks all entries</p>

Trigger/ Frequency <b>Phase Out meeting (Follows)</b>	Actors	Actions	Particular
"recommended"	INC/SUP	Update the <a href="#">Branch Register</a>	Enter in <a href="#">Branch Register</a> the PO date and per main SW the number of families/grade.
	Coordinator	Coordinator Personal Record	Records in his / her own register per main SW: Registration No. of family phased out, Start Date, Total No. of visits, Objectives Selected, Objectives Achieved, PO date and Grade assigned per main SW. <b>Sign</b> and put date of PO on the <a href="#">Family Follow-up Form</a> and on the <a href="#">Master Register (manual)</a>
If family is not decided to be phased-out	Main SW / INC/SUP	Decide to PO or follow-up	Assess the situation and suggest following up the family for a tentative further period of x weeks. <b>Reminder : The period of HV should be upon needs only</b> , not related to targets (average of 6 months)
After the meeting	Main SW, INC/SUP	Mention Evaluation Date on the <a href="#">Follow-up Form</a> and file the forms.	Put date of Evaluation Visit at the end of the <a href="#">Family Follow-up Form</a> and on <a href="#">Master Register (manual)</a> File all forms & documents (e.g. genogram) of the concerned phased-out families in its <a href="#">Family File</a> , which will be stored in the " <a href="#">Phased Out Family Folder</a> ".
Referral to other project	Main SW, INC/SUP		Refer the family to another project if needed.

Trigger/ Frequency	Actors	Actions	Particular
<b>8. Evaluation visit</b>			
After 6 months of Phase Out	Main SW, INC/SUP	Assess the situation of the family	See whether family could complete their remaining objectives.  Fills the <a href="#">Evaluation Form (draft)</a> and see that if the family faced new problems and how it could solve them.  File it in the <a href="#">Family File</a> .
		Re-grade the Family	After comparing the situation of the family at the time of phase out and at the time of evaluation, a <b>re-grading</b> will be performed and special remarks would be also mentioned if any.



Trigger/ Frequency	Actors	Actions	Particular
<b>9. Stand-by</b>			
Unavailability of the family to work on the objectives	Main SW, INC/SUP	Put the family in Stand-by	<p>If the family is not available, whether Main SW has been informed about it or not, the work on objectives is temporarily "frozen": In that case, put such family in <b>Stand-by</b>.</p> <p>Record the family in a separate <a href="#">Stand-by Folder</a> and keep such a family aside from the regular follow-up for maximum 2 months.</p> <p>Put a reminder of that date in the <a href="#">SW diary</a> (either at a date suggested by the family if inferior to 2 months or at maximum 2 months after).</p>
At the end of Stand-by Period	Main SW, INC/SUP	Visit to the family again	See that whether the reason for which the family had been put in stand-by still persists.
At the PO Meeting	Area/branch team with minimum Main SW + Observer+ INC/Sup+ Coordinator	Discuss and decide about the PO or further Follow-up	Discuss and decide on the basis of the result of Stand-by Period whether to continue the follow-up of the family or to phase out.

## C] ACTIONS REVIEW

### 1. Regular Home Visits

Each "Ongoing family" is visited **at least once in a week** by the Main SW.

**In one day at least 8 families are visited.** However, depending on each specific case, the SW can decide to pay additional visits if needed and/or request her/his In Charge/Supervisor to join for a Support visit.


**A SW** who is only involved in HV FDP programme **should have around 30 to 35 on-going families** for the Regular HV.

Considering the turn-over of families, it is recommended that SW will survey regularly, meaning when there are families planned to be phased-out, new families to be ready for selection (see page 5).

NB: In addition, the SW will be involved in Awareness meetings minimum twice a month. It has proved to be an efficient supportive activity to FDP HV in the community.

*Important reminder: There is no standard duration for the follow-up of families. It depends on the specific needs of each family. It is observed that the average duration is 6 months.*

### **Documentation**

- Daily, visits are noted in the SW Diary and adequate **Family Follow-up Form** part is filled-up. When needed, updates as additions or deletions, especially regarding family members and economic status, are made on the previous Family Forms (Survey, Observation).
- If not daily, at least once a week records of visits are being updated by SW in the Master Register (Manual).
-  At least once a month all Master registers are encoded on **IA Smart soft**.

### 2. Phase Out Meeting

Phase Out Meeting is conducted **minimum twice a month** as per schedule of the branch. While carrying out the phasing Out of the families of a Main SW, INC/SUP checks entries in the Master Register (Manual) and Phase Out Register of the Main SW and vice versa.

A Phase Out Meeting is generally **followed by a Selection Meeting on the same day**.

### 3. Evaluation Visit

This visit is done after 6 months of phase out and is conducted by the Main SW and the INC/SUP together.

The goal of the visit is to check whether the family has been able

- to maintain their objectives achieved during Regular HV
- To address and solve new difficulties faced during this period.

On this visit, the [Evaluation Form](#) is filled in order to facilitate the assessment of the family's sustainability. After the visit, grades are assigned again and then recorded in the initial [Master Register \(manual\)](#)

#### 4. **Stand-by**

The family is put in Stand-by when it is not available for the regular follow-up. The Stand-by Period may extend maximum up to 2 months to give time for the family to be available for follow-up again.

## **D] DOCUMENTATION: TOOLS/FORMS / REGISTERS TO BE USED**

### **Explanations of Icons used**

- ◇ What? Objective of the document
- ♻️ How many, per which unit?
- ✍️ Who fills and maintains
- 📄 To be encoded or not
- 📁 In which place is it filled or maintained?

#### 1. **SW Diary**

- ◇ It is a yearly regular diary- a simple notebook is often used- with one or 2 pages/day. It is used to record detailed planning and actual performed tasks of SW. It can also be used to take down notes, esp. during survey.

It is "**The**" **basic organisational tool** of a SW and needs to be maintained REGULARLY and be Readable for others.

- ♻️ 1 per Main SW
- ✍️ Main SW
- 📄 Not to be encoded
- 📁 Filed on Field (update of actual visits, notes taking) and at Branch Office (planning of visits, meetings, trainings, etc...)<sup>o</sup>

## 2. Map of area

- ◇ It is a detailed drawing of a particular geographical area. Each SW territory is defined; lanes/"galis" & landmarks are clearly specified.

It is used to record progress of programme's coverage in an area and to identify which SW is locally in charge, so that the possibility of several different SW approaching the same families is avoided. Therefore, it has to be maintained REGULARLY and be Readable for others.

To be mentioned: Each Main SW territory, , ongoing families, PO families, (*Recommended: houses surveyed, survey refusals*)

- ⊗ 1 per SW, recommended for precision and "easy to update" purposes.

✎ SW

📄 Not to be encoded No

📁 Filed and posted at Branch Office

## 3. Main SW Folders

- ◇ There are 7 basic Main SW folders, in which forms and family files are being filed. Filing follows FDP steps.

- ⊗ 7 per Main SW:

Step/ Period	Survey	Selection	Selection	Permission Visit	Observation & Follow up	Stand By	Phased Out
Folder Name	<a href="#">Survey Forms Folder</a>	<a href="#">Not selected families Folder</a>	<a href="#">Selected families Folder</a>	<a href="#">"Permission Visit Rejected" Folder</a>	<a href="#">Ongoing families Folder</a>	<a href="#">Stand By Folder</a>	<a href="#">Phased Out families Folder</a>

✎ Main SW

📄 Not to be encoded

📁 Filed at Branch Office

## 4. Family Survey Form

- ◇ It is a two-page form. It is used to record initial data on surveyed families. This form is used during Selection Meeting. It will be updated throughout the follow-up when details or composition of family changes.

- ⊗ 1 per Family

✎ Main SW, Observer

📄 Not to be encoded

📁 Filed in Branch Office after survey;

- For families selected, to be kept in the "[Selected Family Folder](#)" Main SW-wise.
- For families Not selected, to be kept in the "[Not selected families Folder](#)" Main SW-wise

⇒ See Full Form in [Annexure N°3](#)

## **5. Family Observation Form**

- ◇ It is a two-page form. This form is filled at the time of Permission Visit after securing the permission of the family. It is filled with one simple but important objective (out of identified objectives) on which the family will work on for the first one-1.5 month, called Observation Period.

This form is filled to have an idea about motivation & understanding of the family about their objectives, its relation with SW, etc during Observation Period, and to estimate the time required for the further follow-up, and consequently the number of Home Visits.

- 🌀 1 per family
- ✍ Main SW with help of Observer if needed
- 📄 Not to be encoded
- 📁 Filed in Branch Office with other Family Forms in the file of respective family SW-wise.

⇒ See Full Form in [Annexure N°4](#)

## **6. Family Follow-up Form**

- ◇ It is a two-page form. It is used to record the progression of families per objectives selected and agreed upon as well as to keep record of each regular home visits.

- 🌀 1 per Family
- ✍ Main SW
- 📄 Not to be encoded
- 📁 Filed in Branch Office with other Family Forms in the file of respective family SW-wise.

⇒ See Full Form in [Annexure N°5](#)

## **7. Phase Out Form**

- ◇ It is a one half-page form. This form is filled at the time of Second Last Visit. This Form contains some questions for which the answers from the family are expected. This form helps to conceive the idea about family's attitude, its confidence, its future planning and sustainability.


- 🌀 1 per family
- ✍ Main SW
- 📄 Not to be encoded
- 📁 Filed in Branch Office with other Family Forms in the file of respective family SW-wise.

⇒ See Full Form in [Annexure N°6](#)


## **8. Evaluation Form**

- ◇ It is a two pages form. It is filled at the time of Evaluation Visit by the Main SW to assess the situation of the family after 6 months of Phase Out.

- 🌀 1 per family

 SW / INC/SUP whose family is being evaluated

 Not to be encoded

 Filed in Branch Office with Family Form, Family Development Form, Family Observation Form and Phase out Form in the "[Family File](#)".

### **A guide of open questions can facilitate the interview:**

- 1) In the last 6 months which of the problems did you solve and how?
- 2) Did you face any difficulty while solving these problems (e.g. lack of information, no self preparation, and lack of confidence...)? Which solutions did you resort to?
- 3) Do you feel endangered about your future?
- 4) Do you want any kind of help or guidance from us?
- 5) Did you help your neighbours or relatives to solve their difficulties? How?
- 6) Would you like to become involved in the FDP Programme?

⇒ See Full Form in [Annexure N°7](#)


## **9. Family File**

◇ It is a bunch of all forms of the same family. A single final folder is used to store all forms, additional notes or documents related to the particular family.

 1 per Family

 Main SW

 Not to be encoded


 Filed in Branch Office with other Family Files in appropriate folder (either "[Ongoing Families Folder](#)" or "[Phased-out Families Folder](#)" SW-wise.


## **10. Master Register (Manual)**

◇ There is separate Master Register for every SW. It is used to keep the information listed in the Family Survey Form, Family Observation Form, Family Follow-Up Form and Family Evaluation Form. This format may be used for encoding and therefore must be well maintained and easily readable

 1 for every Main SW

 SW, daily

 Encoder (minimum once a month, preferably twice)

 In the Branch Office in the custody of respective main SW

⇒ See Full Form in [Annexure N°8](#)

## **11. HV Family Form data Entry (IA SMART data base in Computer)**

# Home Visit Entry Form



Family Sr.No.	77	N.G.O.	ALERT
Family Name	Tippna Narsappa Gauli	Social Worker	SP
Branch (Area) Name	ALERT Mahatma Phule Nagar		

Health			
Objective	Selected	Achieved	
ANC / PNC	1	1	
Child Health Awareness			
Diagnosis of R/P Infection/Dis	1	1	
Fam Planning / Spacing			
Healthier Hygiene (Personal)			

Education			
Objective	Selected	Achieved	
Adult Education			
Formal Education	1	1	
Halt School Drop-Out			
Non Formal Education			
Pre-Primary Education	1	1	

Economics Status		
Objective	Selected	Achieved
Employment		
Loan Facilities (Cash Kind)		
Saving & Budgeting		

Document / Legalisation		
Objective	Selected	Achieved
BC		
Housing Documents		
Other Legal Documents		
RC		

Family Atmosphere			
Objective	Selected	Achieved	
Addiction Control			
Child Care / Child Developmen			
Parenting			
Psychological Balance			
Settlement of Domestic Issues			

Social Issues		
Objective	Selected	Achieved
Alternatives to Child Labour		
Non-Discrimination of Gender		
Settlement of Neighbourhood c		

Environment		
Objective	Selected	Achieved
Better Housing Conditions		
Healthier Environmental Hygiene		

Outcome (Phased Out)			
Outcome	Selected	Achieved	
+	1	1	
++			
=			
=+			
NA			

Permission date	28-mars-07
Observation conclusion date	07-mai-07
Stand by start date	/ /
Stand by end date	/ /
Stand by period (In Days)	

Phase out date	13-févr-08	Total Visits		On going	0	Evaluation visit date	/ /
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<input checked="" type="checkbox"/>	Update
<input type="checkbox"/>	Cancel

## **12. Branch Register (Manual)      “Recommended”**

- ◇ This register gives the overall idea about the monthly quantitative performance of a branch on the field during a particular month. The information in this register is given to the Coordinator at every meeting + at the end of every month.
- ⊗ 1 for every Branch
- ✎ INC/SUP at least once a month, ideally twice (updated after selection/PO meeting)
- 📄 Not to be encoded
- 📁 In the Branch Office in the custody of respective INC/SUP

⇒ See Full Form in [Annexure N°9](#)

## **13. Referral letter (Reference to other Organization / Service Provider)**

- ◇ Presenting NGO, FDP, family situation and exact needs. Mentioning feedback wished.
- ⊗ 1 letter for each need on Letterhead paper of the issuing NGO
- ✎ Coordinator or Supervisor
- 📄 Not to be encoded
- 📁 Sent to other organization / service provider.



# Annexure

## 1. Follow-up of FDP Objectives: Definition of Codes

*The definitions given hereafter are inspired from the general meaning of the words or expressions. They are adapted to the framework of FDP.*

### S – Sensitisation

Causing to sense, to feel or perceive. Making / rendering sensitive i.e. receptive to the attitudes, feelings, or circumstances of others.

**Sensitisation refers to the step where the SW tries rendering the family or one of the members responsive to a need mainly identified by the SW.**

The meaning is closed to "awareness". However, in FDP, *sensitisation* relates more to the sensation / feeling whereas awareness is more about knowledge and understanding. A "sensitised" person or family indicates that the person or family not only knows and understands the importance of a need but actually feels **directly "touched" and concerned by it.**

### A – Agreement

It is the harmonisation in opinion, statement or action; it means being in unison or becoming united or consistent.

It is **common will of both family and SW to take up a need as a family's objective and to put together their efforts and respective resources in order to achieve the objective.**

Family's resources: people, time, financial and material resources, etc.  
SW's resources: adequate technical information and knowledge on the topic, information and maybe contact with reliable external service providers, skills for technical and emotional support.

The agreement is also **based on the existing and potential capacities / skills of both family and SW.** There is no possible agreement if a required capacity is not available.

Important note: when a need is expressed by the family, the SW should ensure first that s/he has got the proper knowledge about the need and the necessary service providers are present and available in the area, before making the agreement with the family. As a result, **agreement may not happen on the same date when the need is mainly expressed by the family.**

### B – Building-Up

Several general definitions enable to establish the meaning of the expression:

- developing or giving form to something according to a plan or process;
- increasing or strengthening by adding gradually to something;
- founding something

In FDP, it is about **developing the family's knowledge and understanding, strengthening the family's existing capacities, stimulating its confidence.**

### P – Process

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Very generally speaking, a process indicates a series of operations, actions, tasks to be performed in order to make a product or obtain some changes / transformations; it designates the method or system for achieving a result.

Important notions are:

- sequence/series
- method
- towards changes or a goal

### C – Completed

It is synonymous with finished, concluded, achieved, come-to-an-end.

### U – Unachieved

Left unaccomplished not attained.

Contrary to the next code, "unachieved" refers to something that was possible, that could have been done. It did not happen either because the necessary actions were not executed, or...

### I – Impossible

The most relevant general definitions of "impossible" for FDP are:

- *something that cannot be done;*
- *having little likelihood of accomplishment*

## **2. Parameters to be considered for Grading while Phase Out.**

Signs	Description
+ +	<ul style="list-style-type: none"> <li>- <u>Rapport</u>: very nice, comfortable and confident relation. Lot of trust. And the family was (very) cooperative.</li> <li>- <u>Motivation</u>: the family was ready to work or shows initiatives to improve their situation, demonstrates commitment to act</li> <li>- <u>Objectives</u>: the family has reached <i>80% to 100%</i> of their major objectives.</li> <li>- <u>Future</u>: it can be predicted in an optimistic way: the family will be able to reach all their objectives and to achieve new objectives, if any. Positive evolution can be seen in all family members, building autonomy and planning for future. Developed sense of anticipation in planning &amp; preventing difficulties.</li> </ul>
+	<ul style="list-style-type: none"> <li>- <u>Rapport</u>: good. The family was most of the times cooperative.</li> <li>- <u>Motivation</u>: the family proved to be motivated and willing.</li> <li>- <u>Objectives</u>: the family has reached <i>60% to 100%</i> of their major objectives.</li> <li>- <u>Future</u>: There is a chance that family may be able to overcome their difficulties, but it is not sure. The family has achieved certain level of autonomy and confidence.</li> </ul>

= +	<ul style="list-style-type: none"> <li>- <u>Rapport</u>: fairly good. The family was a little uncooperative</li> <li>- <u>Motivation</u>: the SW had to make many efforts to motivate the family.</li> <li>- <u>Objectives</u>: the family has reached less than 80% of their major objectives. No major change in the situation, mainly because there are too many difficulties (initially or during follow-up).</li> <li>- <u>Future</u>: it is uncertain: the family's ability to overcome difficulties is doubted. Family demonstrates limited capacity to anticipate future needs and also overlook current needs and situation. The family has low level of confidence</li> </ul>
=	<ul style="list-style-type: none"> <li>- <u>Rapport</u>: not very good.</li> <li>- <u>Motivation</u>: the family was not cooperative &amp; not responsive; they were very casual. No response to SWs guidance.</li> <li>- <u>Objectives</u>: the family has reached less than 80% of their major objectives and only with constant motivation of SW</li> <li>- <u>Future</u>: it looks totally insecure. Not much chance that the family overcomes their difficulties. The family is not in capacity to look confidently at the future due to complex current situation</li> </ul>
NA	<p>Not Available / Not Applicable.</p> <p>The family has left (migration). Or any situation that doesn't enable the evaluation in phase-out.</p>
GC	<p>Guidance Centre.</p> <p>Will be applied at the end of Observation Period, when family is considered autonomous and confident to pay regular visits to GC for working on identified objectives.</p> <p><i>Note: option of GC should not be considered at PO.</i></p>

### **3. Family Survey Form**

*See file attached*

### **4. Family Observation Form**

*See file attached*

### **5. Family Follow-Up Form**

*See file attached*

## 6. Family Phase-Out Form

### FAMILY DEVELOPMENT PROGRAM

### Home Visits – PHASE OUT FORM

Date of Second Last Visit : \_\_/\_\_/\_\_

Family register N°:

Main SW: \_\_\_\_\_

1) What were your problems? How did you solve them?

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2) How do you feel after solving your problems?

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3) Which of your problems are still remaining to be solved? How will you solve them?

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4) What is your future planning? (Children's education & their future, health related issues, increase in income...)

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5) Would you like to give us some suggestions to improve our work with other families?

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**Comments from Main SW:**

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## 7. Family Evaluation Form (*DRAFT, still under development and testing*)

**NGO Name**

FAMILY DEVELOPMENT PROGRAM

### Home Visits – EVALUATION FORM

Date of visit: \_\_/\_\_/\_\_ Family register N°: Main

SW: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of family members met: \_\_\_\_\_

Date of Permission Visit: \_\_/\_\_/\_\_ Date of PO: \_\_/\_\_/\_\_ Grade of PO:

#### I. FAMILY TREE – As of PO: [To prepare before EV]

#### II. SWs OBSERVATIONS

##### 1. Families' reaction to SWs visit

<input type="checkbox"/>	Welcoming / Happy
<input type="checkbox"/>	Avoiding
<input type="checkbox"/>	Upset
<input type="checkbox"/>	Neutral
<input type="checkbox"/>	Disinterested

##### 2. SW is recognized by the family as

<b>A</b>	a member of the organization
<b>B</b>	a member of the community (specially in case where SW is from the same community)

#### III. FAMILY COMPOSITION

##### 1. Added family members

Sr. No.	Relation	Age	Education	Since	Duration	Remarks

##### 2. Family member(s) reduced

Sr. No.	Relation	Age	Education	Since	Reason	Remarks

#### IV. MAJOR CHANGES since PO

##### 1] HEALTH:

\_\_\_\_\_

##### 2] ADMINISTRATIVE SITUATION (documents, lodging...):

\_\_\_\_\_

**3] ECONOMICAL CHANGE:**

- A. Job? \_\_\_\_\_
- B. Loan? \_\_\_\_\_ Participation \_\_\_\_\_ into \_\_\_\_\_ Bishi \_\_\_\_\_ / \_\_\_\_\_ SHG?
- C. Others \_\_\_\_\_ (specify)? \_\_\_\_\_
- D. Present \_\_\_\_\_ Financial status/condition: \_\_\_\_\_

**3] HOUSING CONDITION:**

\_\_\_\_\_

**4] FAMILY RELATIONSHIP:**

\_\_\_\_\_

**II. OBJECTIVES**

**1. Follow-up of pending objective [to be prepared before EV]**

of pending objectives at PO	Yes, How did you manage	No, Reason

**2. Any New Need(s) identified by family**

- A.  Yes  No
- B. If Yes, which need(s): \_\_\_\_\_  
\_\_\_\_\_
- C. How did the family deal with the needs?  
\_\_\_\_\_  
\_\_\_\_\_
- D. Any other place they had taken help from?<sup>1</sup>  
\_\_\_\_\_  
\_\_\_\_\_

**3. Did the family give information/support others in neighborhood?**

- A.  Yes  No
- B. If Yes, which information or which type of support was provided?  
\_\_\_\_\_  
\_\_\_\_\_

**4. Any extra information collected by the family since last 6 months:**

If Yes, which information has been collected and from where?  
\_\_\_\_\_

**ANY VISITS MADE TO GC:**  Yes  No

Number of visits: \_\_\_\_\_  
Reason \_\_\_\_\_ for \_\_\_\_\_ visit:

**III. VISION / FUTURE PLAN OF THE FAMILY**

What are your future plans for next one year?  
\_\_\_\_\_

<sup>1</sup> Even if the assistance is taken from the SW, it can be mentioned here

**8. Master register (manual) (DRAFT, still under development and testing)**

*See file attached*

**9. Branch register (manual) (DRAFT, still under development and testing)**

*See file attached*

**10.FDP Home Visit Flow Chart**

*See file attached*