



USER GUIDE—Community Health Worker Counseling Tool for Family Planning

Introduction

The *Community Health Worker Counseling Tool for Family Planning* is a prototype counseling tool suitable for community health workers (CHWs) who offer family planning counseling. The goal of this tool is to enhance the quality of family planning counseling and service provision at the community level. This tool was originally developed between 2010 and 2011 for the *Training Resource Package for Family Planning*. It was further refined during the *Technical Consultation on Community Counseling*, a collaborative effort convened by the World Health Organization (WHO), the Population Council, and the United States Agency for International Development, held in July 2011 in New Delhi, India. The concepts included in this tool were drawn from several existing counseling tools, including the *Guide to Family Planning for Community Health Workers and their Clients* developed by the World Health Organization, 2011, and *The Balanced Counseling Strategy: A Toolkit for Family Planning Service Providers*, published by the Population Council, 2008. In 2017 the tool was updated to reflect the current eligibility criteria for contraceptive use (WHO 2015¹). In 2019 the tool was field tested with a group of CHWs and clients in Uganda and updated to include their suggestions to improve usability.

The tool comprises a series of questions adapted from the *Balanced Counseling* methodology, a method choice chart, and information about contraceptive methods organized to guide the CHW through the counseling process and help clients choose and use a family planning method that suits their needs. The tool can also be used with clients who already have a method in mind or who need to be reminded about how to use the method they are currently using. Use of the method choice chart empowers the client to take ownership of the contraceptive decision-making process while at the same time, providing information about method effectiveness.

Why the Community Health Worker Counseling Tool for Family Planning?

In a 2014 Population Council-led study (Ahmad 2014²), the *CHW Counseling Tool for Family Planning* was field-tested in India with CHWs, known as ASHAs, alongside the Population Council's *Balanced Counseling Strategy (BCS)* and the WHO's *Guide to Family Planning for Community Health Workers and their Clients (Field Guide)* for general utility and effectiveness. The study authors found that all three counseling tools improved ASHA's counseling skills and client interactions, and helped women make informed choices when selecting their contraceptive method. Furthermore, the *CHW Counseling Tool for Family Planning* compared favorably to the other tools and offered advantages, in that it is portable, easy-to-use by CHWs and allows privacy between the CHW and the client during the counseling session. The inclusion of this job aid in community-based family planning programs offers the opportunity to increase the quality of CHW counseling at the community level and promotes the principles of voluntarism and informed choice.

July, 2019

¹ Medical eligibility criteria for contraceptive use—5th ed. Geneva: World Health Organization, 2015.

² Jaleel Ahmad, Isha Bhatnagar, M.E. Khan and Charlotte Warren. 2014. "Evaluation of the Feasibility, Utility and Effects of the Use of FP Tools at the Community Level in India." New York: Population Council.

How to Use the CHW Counseling Tool for Family Planning

The tool follows this general counseling/screening process:

- assess the client's needs
- ensure the client is not pregnant
- ask questions to help the client narrow the possible method options*
- present information so the client can choose a suitable method
- if the client selects injectables, COCs, or POPs screen the client to determine if she is eligible using the medical eligibility checklists included in the tool, and
- give the client information about how to use the method.

* The method choice chart (last page in the PowerPoint file) should be used by the client as she answers the set of questions designed to identify methods that suit her needs. The client should use a small piece of paper or other item to cover the methods that do not suit her needs. If a CHW has been trained to offer counseling to couples, the counseling tool could be used to support a couples' counseling session.

Guide to Printing the CHW Counseling Tool for Family Planning

The counseling tool should be printed in color (the information on the methods is color-coded to facilitate ease of use) and copied front/back in landscape/horizontal format (when viewing, even pages should be on the left, odd pages should be on the right). The pages should be bound on the short edge using a spiral coil so that the tool/manual will lay flat when opened. The method choice chart (last page in the PowerPoint file) ideally would be printed on heavy paper and laminated—it should not be bound with the rest of the manual. Some CHWs may find it helpful to create and affix tabs to the pages that they use most often.

Guide to Counseling Clients using the CHW Counseling Tool for Family Planning

1. Sit side-by-side so that the CHW and the client can see each other's face and talk privately.
2. Place the method choice chart directly in front of the client with the counseling tool where both the client and CHW can see it (see illustration).
3. Point to information on the method choice chart and the tool pages to help explain key information.
4. Use the color-coded bars (or add tabs) to find information and move from one section to another.
5. Use pages 6–9 to tell the client what you will do during the session, learn more about what the client needs, and explain how the client can benefit from family planning.
6. Use pages 10–11 to make sure the client is not pregnant.
7. If the client knows what method she (or he) wants, ask questions to ensure that the client has made an informed decision (e.g., What have you heard about the method?; What do you like about the method?; What concerns do you have about the method?); then go to that method and explain how to use it.



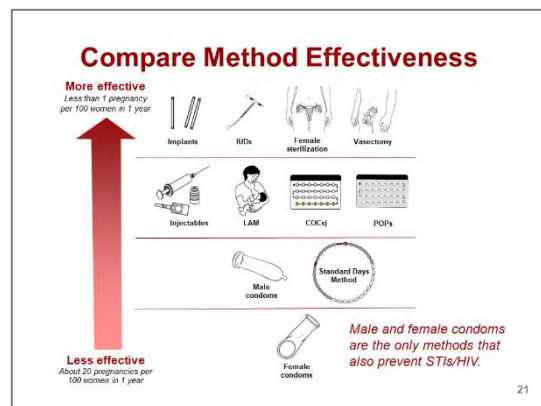
When used properly, the design of the tool supports client-provider interaction by facilitating eye contact, allowing equal access to easy-to-understand information, and enabling confidential discussions.

8. If the client does not know what method she wants, ask the questions on pages 12–21; and, instruct the client to use the method choice chart to remove/cover methods that do not suit her needs.
9. Use the first page of each method to provide an overview of the methods that a client may be interested in using.
10. After the client selects a method, use the second page of each method to describe how to use the method.
11. Use the checklists on pages 48, 49, 50 to make sure a client can safely use injectables, COCs or POPs.

Guide for Adapting the Prototype Tool

There is guidance throughout the prototype tool, captured in the speaker notes view of the PowerPoint file or the comments in the [PDF file](#), to describe possible adaptations to specific pages. Contact CBA21@fhi360.org to request source files. Here are some general recommendations regarding adaptations that should be considered when using the prototype:

- 1- Whether adapting the prototype tool or developing a new tool, use the *Checklist for Evaluating Family Planning Counseling Tools for Community Health Workers* (Annex A) as a guide.
- 2- Ensure the tool matches the mix of methods available to clients—either from CHWs or by referral—by removing or inserting pages and/or specific pieces of information about the available methods. For example, the *Compare Method Effectiveness* chart (included as Annex B) shows all of the methods; however, in the prototype tool the chart has been modified to show only the methods mentioned in the prototype (see image).



Method effectiveness chart from the prototype tool; notice that it has been adapted/simplified to show only the methods mentioned in the prototype.

- 3- Place the pages describing the methods in whatever order makes sense. The pages can be in any order because ultimately the client’s method choices will determine which pages the CHW uses; and the color coding (and the addition of hand-made tabs) will make the pages easy-to-locate. In the prototype tool, the order places the methods that a typical CHW might counsel about most often, first. However, if the CHWs in your program primarily counsel postpartum women, making LAM the method that CHWs counsel about most often, you may want to reposition the pages about LAM accordingly.
- 4- As needed, develop and insert culturally-appropriate illustrations and translate the messages to suit the intended audience for the tool. There are additional illustration options included on the pasteboard.
- 5- Pre-test the tool and the accompanying training/orientation with CHWs to ensure that it works for the CHWs and their clients—adjust the tool and training as needed to achieve the desired results.

Guide to Training on the CHW Counseling Tool for Family Planning

The tool should be introduced during a structured training that includes a thorough overview of the characteristics of family planning methods so that CHWs can demonstrate knowledge and confidence when explaining methods during their interactions with clients. The training intervention should also feature role plays and case studies that allow CHWs to practice with the counseling tool in multiple real-life simulations and receive constructive feedback to improve their performance. [A sample session plan and collateral materials are available](#). A supervised practicum with on-the-job mentoring further ensures that CHWs can use the tool as intended and increases the likelihood that their clients can make a free and informed choice.

Included in this guide (Annex C) is a skills checklist that can be used initially to assess CHW progress while they are learning to use the counseling tool and later by supervisors to evaluate on-the-job performance related to counseling and basic method provision. The checklist also includes an additional set of items that can be used when evaluating the skills of CHWs who have received the special training needed to manage couples’ counseling sessions.

Annex A— Checklist for Evaluating Family Planning Counseling Tools for Community Health Workers

This checklist is designed to help programs decide whether a counseling tool for use by community health workers meets a standard set of criteria for usability and content. The criteria are designed to ensure that the tools are user-friendly for both CHWs and their clients and technically accurate to support high-quality, informed choice counseling. The prototype tool, *Community Health Worker Counseling Tool for Family Planning*, provides one interpretation of how these criteria can be applied to create an effective counseling tool.

A good counseling tool supports dynamic interaction between CHWs and their clients in a manner that provides:

- Respect for a client’s choices
- Efficient decision-making and problem-solving
- Personalized, accurate, and effective information-giving
- Good interpersonal communication
- Tailored counseling that meets a client’s needs
- Support for continued method use

Use the criteria below to evaluate any newly designed or adapted counseling tool.

YES NO

Usability

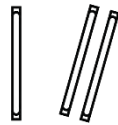
- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | The tool is arranged in an order that supports a structured, client-centered decision-making process. |
| <input type="checkbox"/> | <input type="checkbox"/> | The instructions/prompts for using the tool are clear. |
| <input type="checkbox"/> | <input type="checkbox"/> | The instructions for how to disseminate the tool (e.g., print, electronic) are clear. |
| <input type="checkbox"/> | <input type="checkbox"/> | The language (words used) are easy for CHWs/clients to understand. |
| <input type="checkbox"/> | <input type="checkbox"/> | The key messages for clients are easy to understand. |
| <input type="checkbox"/> | <input type="checkbox"/> | The illustrations in the tool are clear, easy-to-understand, and culturally appropriate. |
| <input type="checkbox"/> | <input type="checkbox"/> | Information provided is complete (nothing missing). |
| <input type="checkbox"/> | <input type="checkbox"/> | Information provided is correct (technically accurate). |

Content

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Information on <i>available</i> family planning methods is provided—including clinic-based methods. |
| <input type="checkbox"/> | <input type="checkbox"/> | Information about the general benefits of child spacing and family planning is provided. |
| <input type="checkbox"/> | <input type="checkbox"/> | Information on each FP method includes: |
| <input type="checkbox"/> | <input type="checkbox"/> | - how effective the method is compared with other methods |
| <input type="checkbox"/> | <input type="checkbox"/> | - how to use the method (including when to start and return) |
| <input type="checkbox"/> | <input type="checkbox"/> | - benefits and risks |
| <input type="checkbox"/> | <input type="checkbox"/> | - side effects (including expected bleeding changes) |
| <input type="checkbox"/> | <input type="checkbox"/> | - who can use (e.g., postpartum, never pregnant) |
| <input type="checkbox"/> | <input type="checkbox"/> | - common myths and misconceptions |
| <input type="checkbox"/> | <input type="checkbox"/> | Eligibility criteria/checklist(s) to ensure compliance with WHO eligibility criteria are provided (as needed). |
| <input type="checkbox"/> | <input type="checkbox"/> | Information about dual protection to reduce STI/HIV infection is provided. |
| <input type="checkbox"/> | <input type="checkbox"/> | Information about when/how to use emergency contraception is provided. |
| <input type="checkbox"/> | <input type="checkbox"/> | Guidance for ruling out pregnancy is provided. |

Compare Method Effectiveness

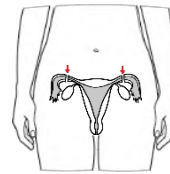
More effective
 Less than 1 pregnancy
 per 100 women in 1 year



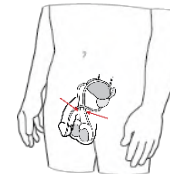
Implants



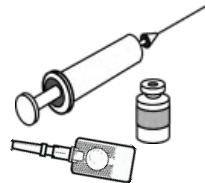
IUDs



Female
sterilization



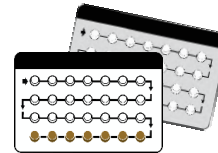
Vasectomy



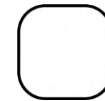
Injectables



LAM



Pills



Patch



Vaginal
Ring



Male
condoms



Diaphragm



Fertility Awareness
Methods



Female
condoms



Withdrawal



Spermicides

*Male and female
condoms are the only
methods that also
prevent STIs/HIV.*

Less effective
 About 20 pregnancies per
 100 women in 1 year

Annex C—Observation Checklist to Assess FP Counseling Skills

Checklist to Assess Family Planning Counseling Skills of CHWs During Simulation or Practicum								page 1/2	
CHW: _____		Client: _____		Observation # _____		Supervisor: _____		Date: _____	
Client's permission to participate in practicum obtained: _____ client's initials _____ supervisor's initials									
	Yes	No	N/A		Yes	No	N/A		
<p>Overall: Communicate Effectively and Maintain Rapport</p> <p>Shows respect and avoids judging client</p> <p>Maintains relaxed, friendly and attentive body postures and eye contact</p> <p>Uses simple, clear language</p> <p>Uses open-ended and probing questions correctly.....</p> <p>Listens carefully to client (paraphrases and reflects).....</p> <p>Asks client about feelings (and shows empathy)</p> <p>Describes client's roles/responsibilities for the session</p> <p>Encourages client participation</p> <p>Explains what will occur during visit and procedures</p> <p>Ensures client understanding and corrects misunderstandings</p> <p>Uses job aids appropriately</p> <p>Correctly records information on data-collection forms</p> <p>Establish Rapport and Assess Client's Needs and Concerns</p> <p>Greets client appropriately</p> <p>Ensures confidentiality and privacy and that client is comfortable.....</p> <p>Asks about reason for visit</p> <p>Asks about client's partner(s), children, family, sexual behavior, health</p> <p>Asks about plans to have children, desire for FP (e.g., spacing, limiting)...</p> <p>Explores STI risk and what client does to avoid STIs</p> <p>Provide Information to Address Client's Identified Needs and Concerns</p> <p>Informs client when needs/concerns are beyond CHW capability</p> <p>Advises on preventing STIs (i.e., abstain, fewer partners, use condoms)</p> <p>Explains benefits of FP and healthy spacing</p> <p>Helps client identify FP methods suited to her or his needs</p> <p>Gives information on FP methods of interest</p> <p>Responds to other client questions or concerns</p>				<p>Help Client Make an Informed Decision or Address a Problem</p> <p>Asks client if he or she has any questions about methods of interest</p> <p>Asks client to choose a method</p> <p>Uses screening checklist to determine if client can use the method</p> <p>Agrees on decision or plan in partnership with client</p> <p>Help Carry Out Client's Decision</p> <p>Gives contraceptive method and condoms for dual-method use, if needed</p> <p>Explains and/or demonstrates correct use</p> <p>Asks client to explain or demonstrate correct use, and reinforces client's understanding and/or corrects client's demonstration</p> <p>Reminds client about side effects and reasons for returning</p> <p>Gives supplies (as needed)</p> <p>Role plays or rehearses negotiation skills and helps client plan approach</p> <p>Arranges follow-up, resupply, and referral to outside services, as needed ..</p> <p>Additional Observations Related to Counseling Couples</p> <p>Creates and maintains a bond/partnership with the couple</p> <p>Shows equal concern for both members of the couple</p> <p>Expresses respect for the couple's relationship.....</p> <p>Identifies the couple's shared experiences and history</p> <p>Enables balanced participation of both partners</p> <p>Models appropriate listening and communication skills</p> <p>Supports a dialogue between the couple</p> <p>Considers feelings expressed and observed</p> <p>Raises difficult issues that the couple may need to address</p> <p>Admires and builds on the couple's strengths and self-reliance</p> <p>Empowers the couple to negotiate small behavior changes</p> <p>Eases tension and lessens blame; redirects and rewords questions and discussions that are blaming or unkind</p>					

