



*Continuing Care for Mothers, Children, and  
Families Following Prevention of Mother-to-Child  
Transmission of HIV (PMTCT) Programmes*

# **Field Visit Guide**



*October 2007*





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The *Continuing Care for Mothers, Children, and Families Following Prevention of Mother-to-Child Transmission of HIV (PMTCT) Programmes* Module seeks to provide a Caribbean approach to linking HIV-infected women and their families with ongoing HIV care, treatment, and support needs after participation in a national PMTCT programme.

The components in this Module are:

- Trainer Manual
- Participant Manual
- PowerPoint Slides
- Field Visit Guide

There is also an Adaptation Guide, developed for the group or individual tasked with adapting the generic Caribbean materials for implementation in a specific country or setting.

## Field Visit Guide

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The field visit experience is designed to complement the classroom training of the *Continuing Care for Mothers, Children, and Families Following Prevention of Mother-to-Child Transmission of HIV Programmes* Module (the Module). The goal of the field visit is to observe and interact with healthcare workers and clients who are in PMTCT, HIV care and treatment, and social welfare settings in order to better understand client flow, the national system of comprehensive care, and various barriers to the delivery of comprehensive care.

During the field visit, participants will have the opportunity to observe and inquire about client flow, linkages, and referral systems between different programmes and agencies who work with and care for HIV-infected clients and their families. This field visit provides participants with a practical experience to reinforce the previous days' didactic training.

This Field Visit Guide incorporates the lessons learned from the pilot of the Module and site visits that were conducted in the Bahamas in March 2007. This guide provides general advice in setting up a meaningful practical experience with the understanding that individual country experiences will vary.

### **There are 6 parts to this Field Visit Guide:**

1. Planning the Field Visit
2. Conducting the Field Visit
3. After the Field Visit
4. Suggested Time Line for Field Visit
5. Sample Field Visit Interview Guide
6. Sample Evaluation Form

## Planning the Field Visit

### **Outline Learning Objectives of Field Visit**

Before planning the field visit, determine what the learning objectives of a field visit are for your specific country circumstance, e.g., countries that have linkages between postpartum care and HIV treatment site may chose to focus the field visit on strengthening the linkages to social welfare agencies and/or community-based organizations. The learning objectives for the field visit will determine the choice of sites.

### **Suggested Learning Objectives for the Field Visit**

During the field visit, the participant will:

- Observe the experience of comprehensive care being delivered for HIV-infected PMTCT clients.

- Describe how the different elements of comprehensive care for HIV-infected PMTCT clients are addressed in a field visit setting.
- Identify and describe the system of referrals and linkages between PMTCT, HIV care and treatment settings, and social welfare services.
- Identify barriers to comprehensive care delivery and potential solutions to those barriers through interviews with healthcare workers and clients.

### **Select and Prepare Field Visit Sites**

It is recommended that participants visit different sites where HIV-infected women and their families receive care:

- Antenatal care (ANC) setting
- Labour & delivery
- Postnatal ward, clinic, or home visit
- Postpartum ward, clinic, or home visit
- HIV care and treatment site for mother and her child

It is also recommended that the field visit include a social welfare agency or community-based organization working with HIV-infected clients. This type of visit can broaden the understanding of resources available to refer their HIV-infected clients. Suggested field visit sites include:

- Social welfare agencies, private or public, working with HIV-infected clients e.g., mothers, orphans, or men
- Community-based organizations conducting support groups, providing meals, or training for PLHIV

Other potential sites to broaden the scope of the field visit can include:

- Laboratory site that performs rapid HIV testing and PCR testing of infants
- Pharmacy that distributes ARV prophylaxis and treatment
- Site providing mental health counselling or services to PLHIV

The choice of sites will depend upon local circumstances but should seek to provide participants with first-hand experience to observe and ask questions about the linkages and interactions, or lack thereof, between the different programmes and facilities providing HIV care.

In the process of selecting the sites, discuss the following with the facility manager and/or clinical staff, the:

- Objectives of the field visit
- Anticipated number of participants and size of small groups
- Anticipated length of field visit
- Best day or days for the visit
- Staff who will be available to meet with participants
- Potential to observe activities with clients
- Potential and appropriateness of interviewing a client

Inviting staff from the field visit sites to the didactic portion of the training is a strategy that can provide continuity and understanding between the two portions of this training – the didactic portion of the Module and the field visit. Selected staff may also be good candidates to be field visit leaders.

When requesting permission for the visit, suggest that the staff at the site alert clients on the field visit day of the purpose and goals of the field visit. This will help to ensure that clients do not feel that their confidentiality is being breached and may help clients feel less alienated.

### **Choose the Size of Groups**

The size of the groups will depend on the number of participants, the size of the facilities being visited, and the number of clients at the facility. Participants should be divided into groups and visit different sites. If necessary, the visits could be staggered over the course of a day.

- Small groups of 4-6 participants are recommended so as not to overwhelm the sites or the staff.
- One strategy to avoid overcrowding at a site is to have participants stay together as a large group during the orientation to the site and then rotate through the clinical areas in smaller groups so as not to overwhelm clinical staff and clients.
- It is also possible to divide participants into groups according to work responsibilities and settings.

### **Select and Prepare Field Visit Leaders to Accompany Participants**

Field visit leaders act as hosts at the chosen field visit sites. They function as an intermediary between participants and the site staff. Field visit leaders can be participants or trainers of the Module or employees of the field visit site.

One of the responsibilities of the field visit leader is to orient participants to the site prior to the visit. Field visit leaders should be prepared to explain the following about each site they visit:

- What is the client flow into and out of this site?
- How does an HIV-infected client transition from this site to the next? What specific documentation is used at intake? At discharge?
- What PMTCT interventions take place at this site?
- What HIV care, treatment, or support services are offered at this site?

Providing this basic overview will permit participants to observe potential gaps in service or areas for improvement, as opposed to trying to understand which PMTCT interventions occur at which point in time. Participants should be encouraged to use their time wisely; observing interactions and asking questions of facility staff and clients if arranged prior.

Field visit leaders may also assist site staff in telling clients about the objectives of the field visit and reassuring clients that their confidentiality will be protected.

## **Conducting the Field Visit**

### **Orient Participants to Field Visit during the Didactic Training**

During the didactic portion of the training, review the field visit objectives with participants. Make sure that the trainers, conducting the didactic portion of the Module, know what sites are being visited and the objectives of the visit.

During the didactic training, schedule time to:

- Hand out and review questions on the Sample Field Visit Interview Guide.
- Ensure that all participants know what site to report to first, second etc., how much time they have at each site and who the field visit leader is at each site.
- Ensure that participants have directions of how to get to each site.
- Post field visit group assignments and directions so participants can review throughout the training.
- Ensure that participants know when and where to return for the debrief session following the visit.
- Ensure that at least one field visit leader will accompany each group of participants. The field visit leader can accompany the group of participants throughout the day or they can be based at the site and welcome participants.

### **Prepare on the Morning of the Field Visit**

- Ensure that each participant is wearing their name tag.
- Ensure that participants have paper and pen available to write down questions and answers in the Field Visit Interview Guide.
- Provide additional copies of the Field Visit Interview Guide, when needed.

### **Provide Direction While at the Site**

- Field visit leaders should conduct an orientation to each site (suggested questions listed above) where they review the flow and activities that occur at each site just prior to visiting the site.
- Once at the site, the field visit leader should check in with the staff. The field visit leader should then assist participants in finding a healthcare worker to observe and ask questions and if possible, a client to interview.
- Remind participants to return for the debrief and evaluation at a designated time and location.
- Thank each healthcare worker and client upon conclusion of each observation or meeting.

## **After Field Visit**

### **Conduct Debrief**

Once all participants have returned from their sites, allow approximately 1-2 hours for debriefing and evaluation to summarize and conclude the training. The first hour can be used for small groups to discuss their answers to the Field Visit Interview Guide and observations. A volunteer from each group should be prepared to present a short summary to the larger group of their observations and findings.

The following questions may be helpful in directing a large group discussion about the field visit:

- How did their observations compare with what they learned about comprehensive care delivery the previous days? What was the same? What made it different?
- Did the field visit meet their expectations?
- Is there something that could have made the visit more beneficial?
- Did they observe any practice that they felt could be improved?
- What gaps in service did they observe and what would they suggest to fix the problem?

### **Conduct Evaluation**

Conduct formal evaluation of the field visit; see sample evaluation form at the end of the Field Visit Guide.

### **Give Thanks**

Follow up with thank you notes to the staff at the various sites that took time to meet with the participants. Also thank the field visit leaders for their work.

## Suggested Time Line for Planning and Conducting a Field Visit

Suggested Time Line for Planning and Conducting a Field Visit	
<b>1–4 weeks before the training</b>	
<b>Plan and organize the visits to a variety of sites</b>	Contact one or more local health facilities (PMTCT site[s] <b>AND</b> HIV Care and Treatment site[s]) to gain permission for participants to visit and meet with several members of staff and client(s) if possible. Other suggested sites are listed in “Planning the Field Visit” section of this guide.
<b>Write and send confirmation letter(s)</b>	Once you have commitments from staff at the various sites, follow up with a letter or telephone call confirming the following: <ul style="list-style-type: none"> <li>▪ Date and timing of the visit</li> <li>▪ Visit objectives</li> <li>▪ Anticipated length and number of participants</li> <li>▪ Role of the field visit leader(s)</li> </ul>
<b>Identify Field Visit Leaders</b>	Identify and confirm field visit leaders. Review expectations and objectives of the field visit.
<b>Develop Field Visit Interview Guide</b>	Finalise the Field Visit Interview Guide for participants. See the sample guide below.
<b>1, 2, or 3 days before the training</b>	
<b>Confirm the Sites</b>	Telephone the staff with whom the participants will be meeting to reconfirm. Provide staff with the final number of visitors.
<b>Confirm the Field Visit Leaders</b>	Telephone or confirm attendance of field visit leaders at didactic portion of the Module and/or at the site during the field visit.
<b>During didactic portion of training</b>	
<b>Review objectives and logistics of field visit</b>	<ul style="list-style-type: none"> <li>▪ Hand out and review questions on the Field Visit Interview Guide.</li> <li>▪ Ensure that all participants know what site to report to first, second etc., how much time they have at each site and who the field visit leader(s) is as well as a contact person at each site. Ensure that they know when to return for the debrief session following the site visit.</li> </ul>
<b>Conduct Field Visit</b>	

<b>At the end of the Field Visit</b>	
<b>Debrief and Evaluation</b>	<ul style="list-style-type: none"> <li>▪ Conduct debrief (See sample discussion questions above)</li> <li>▪ Conduct evaluation (See suggested evaluation forms below)</li> </ul>
<b>Within a week after the Field Visit</b>	
<b>Send out thank you notes</b>	Follow up with thank you notes to the staff at the various sites that took time to meet with the participants. Also thank the field visit leaders.
<b>Within one month</b>	
<b>Evaluate field visit</b>	<p>Compile and analyze results from the field visit evaluation forms.</p> <p>Compile a report or summarize the list of improvements to be made during the next field visit.</p>

## Sample Field Visit Interview Guide

### Instructions for participants

Throughout the field visit, use the questions below to guide observations and exchanges with the field visit hosts, leaders, and fellow participants. Questions provide a starting point for discussion as you learn about the different aspects of care, treatment, and support for women and families in your country. By the end of the field visit, participants should have a full picture of what services are available and how they are interconnected. It is not necessary to ask *every* question of the field visit host or leader, instead use the questions to inform the experience and to debrief at the end of the visit.

### Labour and Delivery Ward (L&D) and Postpartum Setting

- After delivery, how are women linked with postpartum care?
- Approximately, how many or what proportion of women miss their appointments for postpartum care?
- How are women who come from rural areas or outlying islands areas provided with postpartum care with respect to delivery of services and/or transportation?
- What systems are in place to retain women in postpartum care?
- How are referrals made to an HIV care and treatment clinic during a postpartum visit?
- How is a mother educated about her own needs?
- How is a mother educated about her infants needs?
- Is the family involved, if no why not?
- Is her partner involved, if no why not?
- Were all of the topics on the Postpartum Checklist in Appendix B raised?

### Linkages from PMTCT to Comprehensive Care Services for Mothers and Families

- What are the linkages to other programmes or community-based organizations providing the following services?
  - Partner and sibling testing, including disclosure counselling
  - Psychosocial services to persons living with HIV/AIDS
  - Family planning
  - ARV treatment
  - Infant-feeding support
  - Mental health services
  - Other medical needs e.g., drug treatment
- What forms and processes are used to refer clients?
- How are clients informed about referrals?
- What are the mechanisms used to follow-up referrals?
- What gaps are there in the referral process?
- How could the referral process be improved?

**Sample Field Visit Interview Guide** *continued***HIV Care and Treatment Site for Mother and Child**

- Describe typical path a women, who was diagnosed with HIV during ANC, would take to get to HIV care and treatment.
- How is an HIV-exposed infant connected with care?
- What obstacles do mothers face along the way? Ask a healthcare worker or client to be specific:
  - Economic
  - Stigma
  - Understanding of appointment schedule for self and infant
  - Ability to get to all appointments
  - Disclosure
- What forms of communication exist between PMTCT and HIV care and treatment programmes?
- How are clients retained in HIV care and treatment? Are incentives used? Please describe.
- How are infants of mothers with unknown HIV status followed-up?
- What systems are in place at the clinic, regional or national level to locate mothers and their families who need HIV care and treatment?
- What are the critical aspects of a follow-up visit? For the mother? For the child?

**Social Welfare Agency or Community-based Organization**

- What services are available to HIV-infected women and their families?
- How are these services delivered?
- How does this social welfare agency or programme interface with the medical system?
- How do they receive clients by referral?
- How have they worked to increase their referrals?
- Where and how do they refer clients for medical issues?

**Laboratory or Pharmacy Setting**

- What tests are performed at this site e.g., PCR for infants, HIV rapid testing during labour?
- What services are provided? Are additional services for clients offered e.g., adherence counselling in case of pharmacy?
- How does the staff at this site interact with other facilities and healthcare workers?
- How does the staff envision their role in the comprehensive care of women and families?

**Sample Field Visit Evaluation Form**

**INSTRUCTIONS:**

This form has been designed to obtain your feedback about the field visit portion of the ***Continuing Care for Mothers, Children, and Families Following Prevention of Mother-to-Child Transmission of HIV Programmes Module***. Your responses will remain anonymous and will be used to help improve the overall training.

- 1. Did the field visits help you to better understand the referral and linkage systems between PMTCT, HIV care and treatment, and social welfare agencies/community-based organizations? (Please check box)

YES

NO

If the answer is "NO", please explain below:.

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- 2. Were you able to gain an appreciation or understanding of the challenges client's face in their ongoing comprehensive care needs? Please explain below:

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**Sample Field Visit Evaluation Form cont'd**

3. Was there a relationship between what you observed today and the previous day's classroom training for this Module? Please explain below:

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4. How would you improve the field visits? Please explain below:

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*THANK YOU!*