Monitoring Skills for the Community Rights Worker

ICRW International Center for Research on Women
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Uganda Land Alliance
Promoting Land Equity & Justice
ULA

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About this Toolkit

Property rights economically empower women by creating opportunities for earning income, securing their place in the community and ensuring their livelihoods. When women are economically empowered, it spurs development for their families and communities.

Property Rights and Gender in Uganda: A Training Toolkit seeks to strengthen understanding of property rights for women and men as equal citizens. Because women in Uganda are often not treated as equal citizens, toolkit materials address what rights women have, how to communicate women's rights, and the issues preventing women from exercising their rights.

The overarching goals of the training are to increase Ugandans'

- knowledge of their legal rights to property,
- understanding and recognition of women's and men's equality before Ugandan law, and
- ability to exercise and protect their own property rights while respecting others' rights.

The first step in securing property rights is bringing knowledge to women, men, leaders, and communities of *everyone's* legal rights and emphasizing that women's legal rights exist, are protected by law, and are just as important as men's.

The toolkit has five modules:

- Rights and Gender in Uganda
- Land Law and Gender
- Property Rights in Marriage and Family
- Inheritance Law, Wills and Women
- Monitoring Skills for the Community Rights Worker

Trainers can do all modules or focus on ones of their choosing. However, we recommend beginning with "Rights and Gender in Uganda," especially for community rights workers with little previous training. This module uses a human rights approach as a positive starting point to introduce women's rights, property rights and gender.

The modules use five different methods to engage participants:

- **Background** sections introduce new material, explain new concepts and discuss the gendered aspects of the module topic. Facilitators can use the Background sections as short lectures, reading exercises for participants or segues to new topics.
- **Lecture** sections provide specific information about the module topic. Facilitators need to present all of the information in Lecture sections clearly.
- **Discussion** sections promote group conversation, encourage participants to ask questions and share experiences, and highlight differences between custom and written law. The facilitator's role is more to guide the conversation than present information.
- **Exercise** sections give participants a chance to practice a new skill or idea. Exercises can be used to make the ideas in Background, Lecture and Discussion sections more concrete.
- **Handouts and Resources,** at the end of every module, can be used during the training and by community rights workers in their own outreach or sensitization work.

Monitoring Skills for the Community Rights Worker

Reporting about cases and activities can help the community rights worker and his/her organization provide services more effectively. It can also help the community rights worker be more informed and efficient through documenting challenges and lessons learned. To get the most benefit out of reporting, it is essential that the rights worker build skills through learning good methods to record data and complete reports, what information to include in a report, and what to do with the reports once they are completed.

The module provides a tutorial on monitoring and reporting. It also includes case study exercises to practice what has been learned.

Module Objectives:

Community rights workers will ***understand***:

- What monitoring is
- How their organizations use their reports
- Why consistency is important

Community rights workers will ***be able to communicate***:

- The key information about cases and sensitization events using monitoring forms

Handouts:

Three monitoring forms (Client Visit Form, Monthly Client Visit Log and Community Sensitization Log) are included alongside the exercises in which they are used.

Total Time: 7 hours

Note to the Facilitator:

It will be helpful to have a speaker of the local language facilitate or co-facilitate this module. Several terms used in the module have specific meanings in the context of monitoring that may not carry over into the local meanings.

It may be helpful to translate the monitoring forms into the local language, especially the lists at the bottom of the forms, to ensure that the community rights workers share a consistent understanding of the terms in the lists. Consistency is crucial to obtaining useful data for monitoring purposes.

Monitoring

Lecture What is Monitoring?

(15 minutes)

The Merriam Webster dictionary[1] defines monitoring as:

> **Definition 1:** to watch, keep track of, or check, usually for a special purpose.

In the field of Monitoring and Evaluation of programs, policies and interventions, monitoring is defined as:

> **Definition 2:** regular, planned and organized collection of information to describe what your program is doing.

Monitoring is about the big picture, not about individual clients or even individual rights workers. It is like flying high over the communities and programs: you would not see the details of every case, but you would see the number of cases, the types of cases, common challenges encountered, and so on. Monitoring involves regularly collecting focused information across many rights workers to find patterns in the activities they do, challenges they face, and the needs of the communities. For example, looking across information from all its rights workers, an organization might see that there is a steady increase in boundary disputes or in domestic violence. It might then decide that it needs to provide training or other resources to its workers about boundary disputes and violence.

To be able to see the big picture, someone on the ground needs to be communicating what is happening. When a rights worker (or any service provider) records information about client visits and sensitization events, s/he is "monitoring" activities. Writing reports about activities using the recorded information is a way to share monitoring information with others.

Each rights worker is the only person who knows the details about his/her own work and the influence it is having on the community. While collecting information and reporting on activities may seem like a large task, this information is important and should be shared with others. Knowledge gained through client visits and sensitization events will be lost if it is not written down. Information such as challenges, lessons learned, and activities that worked especially well can help the individual rights worker, his/her fellow rights workers, and the organization that they represent to learn and improve its programs and services.

Lecture What is Monitoring For?

(30 minutes)

Monitoring answers big picture questions about a program, like, "What portion of cases are about inheritance or domestic violence or boundary disputes? Are some kinds of conflicts becoming more common? What topics do community rights workers need more training in? What resources do community rights workers use most?" These kinds of questions help organizations to understand the needs of rights workers and the communities they serve.

Here are common "big picture" questions that organizations use monitoring to answer:

1. *What services were provided?*

   Documentation of activities will help the organization know the types and amount of services provided. This information can show how community rights work affects or changes the community's knowledge, attitudes and practices.

1 monitor[2]. (2008). In *Merriam-Webster Online Dictionary.* Retrieved December 1, 2008, from http://www.merriam-webster.com/dictionary/monitor[2]

2. *What feedback or information do community rights workers need?*

   Organizations generally do not have the funding to follow up with every community rights worker to make sure that s/he has the necessary resources to do the work and is providing services effectively and accurately. Monitoring data provides a channel for the rights workers to describe the resources they are using, additional resources they need, their challenges, their successes and their questions. With information about the types of cases and the action rights workers take, the organization can make a general assessment of whether the rights worker is giving appropriate advice.

3. *What can we tell funders or potential funders about what we need and what we do?*

   Funding is a major obstacle to effectively providing services for most organizations. Therefore, attracting potential funders is an important use of monitoring data. A proposal or discussion with a funder is much more effective if you have data to back up your statements and more concretely describe the issues. For example, which one of these statements sounds better to explain the need for more money to buy bicycles for community rights workers: "The community rights workers need to travel long distances each day just to get to their clients, which limits the time they have to help their clients," or "The community rights workers are traveling on average four hours a day just to reach their clients, which limits the time they have to help their clients to an average of two hours a day." Having data will strengthen the organization's case for funding.

4. *On what topics should we focus training? Where should we focus the organization's resources?*

   Many resources would be helpful for organizations to provide to their rights workers, including refresher trainings and legal resources that rights workers can bring to client visits. Because every organization has limited funding, it is important to spend money as efficiently as possible on resources that will help the rights workers do their work well. If organizations could collect data on the number of each type of case that rights workers handle, they would have a better idea of what to focus on in training and what legal or educational resources would be most useful to rights workers (for example, information about criminal law may not be useful if the majority of cases rights workers see are land disputes).

Lecture Why is Monitoring Important to the Community Rights Worker?

(30 minutes)

Monitoring does not only benefit the organization as a whole, but it also helps improve the effectiveness of each community rights worker. For example, monitoring can help each worker:

1. *Keep track of client's cases.* It is difficult to remember all of the details of a case between each visit with the same client. Writing down the information from each client visit will allow the rights worker to refer easily to his/her notes to read and remember details from past meetings. This is particularly helpful if the same client comes for more than one issue or if the rights worker is assisting more than one client at a time.

2. *See patterns or similarities in work.* Documenting activities can help when dealing with similar cases that come up in the future. If the rights worker records the details of each case, s/he can refer back to these cases and how they were handled when other clients come with similar problems. This is also helpful for community sensitization events. If one event is particularly successful, it will be much easier to try a similar event in another place if the first one was well documented. Documenting activities provides a way to share successes and challenges with other community rights workers.

3. *Receive training or resources where these are most needed.* An organization can use a rights worker's information to identify areas where s/he needs more assistance or resources. If the monitoring data show that a particular issue is becoming more common in the community, the organization can tailor future trainings to include a discussion about that topic. In addition, monitoring data can reveal particular areas where community rights workers need technical assistance.

4. *Answer the same big questions when a group of community rights workers become a CBO.* If rights workers would like to band together to form a community based organization, they will eventually be interested in answering the "big picture questions" themselves as their group becomes self-sustaining. The group will be able to use monitoring data to apply for its own funding, provide its members with trainings and resources in the most important areas, and identify the needs of the communities so sensitization events can be given on those topics.

Using Forms to Collect Monitoring Information

Note to the Facilitator:

Hand out monitoring forms included in this section before starting so the participants can refer to them throughout the discussion. It would be helpful to have copies of extra blank forms for the participants to use in their exercises.

The following estimated times include full discussions and exercises for each form:

- Client Visit Form: 3.5–4 hours
- Monthly Client Visit Log: 45 minutes–1 hour
- Community Sensitization Log: 45 minutes–1 hour

You may find that you need to spend the majority of the session on the **Client Visit Form** to ensure that all community rights workers understand how to fill in the forms and have a similar understanding of pre-coded lists on the forms. Giving the participants the chance to practice filling out forms will make any uncertainties or difficulties they are having more apparent and create an opportunity for discussion.

Discussion Introduction to Forms

(15 minutes)

Organizations often develop guidelines or forms to specify the information that should be recorded and reported through monitoring. Explain to the participants that monitoring forms are usually preferred over narrative reports because:

1. *Monitoring forms define important information to be collected.* If you look at the sample Monthly Client Visit Log, you will see different boxes that need to be filled in (“Client Name,” “Type of Case,” “Action Taken,” etc.). This is the information that the organization decided was important to know about each case. Using the form makes sure you document this information that might be accidentally left out of a narrative report.

2. *Monitoring forms make it easier to record and analyze information.* Information that is documented in forms is easier for the organization to enter into a database and analyze. Reading through narratives and picking out the important information is very time consuming. Quicker analysis means that the information can be used quickly to improve the program.

   Your organization will analyze all of the monitoring information that you and your fellow community rights workers provide. Ideally, someone will collect all forms and information community rights workers send in, input them into a computer, and use the computer to sort and summarize all the information to answer the most important big picture questions.

3. *Monitoring forms improve the consistency of information.* Consistency in data collection means that everyone collects the *same information* with the *same level of detail* and has *similar interpretations* or understanding of the information requested. Monitoring forms improve the consistency of the data because they set a standard for what information will be collected and how the people collecting information will interpret and record it.

Background Using Different Monitoring Forms (15 minutes)

This section will go over how community rights workers can use monitoring forms to track their work. The participants also will have a chance to practice using the forms. The forms here are only examples; participants may find that their organization has its own forms that ask for different information or have a different format.

This module contains three monitoring forms to track community rights workers' activities. Rights workers use the **Client Visit Form** to keep notes and important information about their meetings with clients. Then rights workers report key information from their Client Visit Forms into the **Monthly Client Visit Log**. They will turn in the Monthly Client Visit Log to the organization but keep the Client Visit Form with more details for their own records. Community rights workers can also complete and turn in a **Community Sensitization Log** that gives key information about events the rights worker held or participated in.

Lecture Client Visit Form (15 minutes)

The Client Visit Form below collects information about client visits. Each small box corresponds to a different piece of information that the organization wants the community rights worker to collect. The form is set up to make client visits as natural as possible while still collecting monitoring information. The rights worker should take free-hand notes in the space provided when speaking with the client (or directly afterwards). After the visit, the community rights worker can refer to his/her hand-written notes to fill out the rest of the form.

The community rights worker should keep the Client Visit Forms with him/her as a record and may refer back to them if there are multiple visits with the same client. Each form should contain information for only one client and for only one case. If the same client brings the rights worker multiple cases, the rights worker should fill out a separate form for each of the cases. If a client has multiple visits for the same case, the details of each visit with the same client for the same case should be recorded on a separate line in the "*Visit Information"* chart on the form.

Discussion Reading and Understanding the Client Visit Form
(45 minutes)

1. Have the participants read the Client Visit Form and explain what information they think would go in each box. As they go through the form, clarify their explanations using the descriptions in the table on the following page.

2. Explain that for the columns “Type of Case,” “Action Taken,” and “Outcome,” there are categories at the bottom of the form that the participants could choose from as the best description. Ask them to read the lists of categories. Because it is very important for consistency that they use the words on the lists, you need to make sure that the community rights workers understand exactly what is meant by each word.

Note: It might be very difficult at first for the community rights workers to classify the type of case. Make sure you:

1. Continue to go through the definitions of the different case types throughout the duration of the training. Pay particular attention to overlaps between land disputes and inheritance. Make sure that the rights workers know the distinction.

2. Emphasize that the rights workers should record what the client says his/her problem is. For example, the client may tell them that s/he was kicked out of the marital home and wants help to get his/her possessions back. The rights worker might want to record that the client has marital problems, but really the client wants legal advice on how to reclaim his/her possessions.

3. Discuss the logistics of completing the form with the community rights workers. They should fill out the form according to the guidelines above and using the list of potential responses when applicable. It is important that they fill out this form as soon after the visit as they can, but they should not do it while talking with the client. They should instead take free-hand notes during the meeting in the space provided on the second page of the form.

The **Client Visit Forms** are to be kept with the community rights workers as a record of their cases. They will complete a Monthly Client Visit Log that summarizes their cases each month. The **Monthly Client Visit Log** will be turned in to their organization.

Pages 11–14 have an example of a blank Client Visit Form and a Client Visit Form that is already filled in.

Information	Description
Rights Worker Name	Record your name
Client Name	Record the name of the client
Physical Address	Record the village and sub-county that the client is from
Sex	Record the sex of the client by circling M for male or F for female
Marital Status	Choose from the "Marital Status" list at the bottom of the form to classify your client's marital status. Specify the marital status if requested by your choice on the list.
Age	Record the age of the client
Occupation	Record the occupation of the client
Education	Record the highest education level of the client
How heard of rights worker	Choose from the "How heard of rights worker" list at the bottom of the form to specify how the client heard about your services
Other party (group) name	Record the name of the other person or group of people involved in the case (if applicable)
Relationship to Client	Record how the other person is related to the client
Type of Case	Choose from the "Type of Case" list at the bottom of the form to classify the legal issue that the client discussed with you. Make sure to record what the CLIENT says is their problem. You should not assume or create the client's problem. Ask yourself: "Why did the client come to visit me?"
Date	Record the date of the visit
Duration	Record the amount of time you spent with the client. If you do not have a clock, estimate the time to the best of your ability.
Action Taken	Choose from the "Action Taken" list at the bottom of the form to classify the action that you took to help the client. Specify the action taken if your choice from the list is "Other."
Outcome	Choose from the "Outcome" list at the bottom of the form to specify the outcome of the case. Specify the outcome if your choice from the list is "Other."
Comments	This is a place where you can write any notes about the visit. For example, if you are talking to a client about domestic violence and her husband walks in the room, you could note that here.
Prior Help	Ask the client if s/he has sought other help before coming to you. Record the answer in free-hand here.
Problem of Client (narrative)	This is where you take free-hand notes while talking to your client. Later you can fill out the rest of the monitoring form. Be sure to ask and record all of the information that is requested on the other parts of the form.

Client Visit Form

Rights Worker's Name:

Client information:

Client Name:	**Village:** **Parish:** **Sub-county:**
Sex: **M** **F**	**Marital Status:**
Age:	**Occupation:**
Education:	**How heard of Rights Worker:**

Other Party information:

Other Party (group) Name:	**Village:** **Parish:** **Sub-county:**
Sex: **M** **F**	**Marital Status:**
Age:	**Relationship to Client:**

Type of Case:	If "Other," specify: ____________________

Visit Information:

Date	**Duration** (minutes)	**Action Taken** (if "gave legal advice," "counseling," or "other," then specify)	**Outcome** (if "referred case" or "other," then specify)	**Comments**

Marital Status	**Type of Case**		**Action Taken**	**Outcome**
Married (Customary)	*Land boundary dispute*	*Marital problem*	*Gave legal advice (specify)*	*Referred cases: (specify to whom)*
Married (Civil)	*Eviction by landlord*	*Domestic violence*	*Counseling (specify)*	*Examples: Local Council courts, Probation and Welfare officers, Police (family and protection unit), Elders, Legal aid clinics, Magistrate court, Administrator General's Office, Sub-county chief, FIDA, ULA, etc.*
Married (Church)	*Eviction by partner*	*Child abuse/neglect*	*Mediation*	
Married (Muslim)	*Land grabbing*	*Custody*	*Check-up visit only*	
Married (Don't Know)	*Fraudulent sale/claim to land*	*Murder*	*Other (specify)*	
Married (Doesn't Specify)	*Sale of land without consent*	*Defilement*		
Single	*Trespass*	*Debt*	**How heard of worker**	*Scheduled return visit with client*
Widow	*Other property dispute*	*Theft*	*Poster*	*Scheduled meeting with other party*
Divorced/Separated	*Inheritance*	*Property damage*	*Radio show*	*Scheduled court date*
Cohabiting	*Writing a will*	*Assault/violence*	*Friend/Family*	*Scheduled meeting with LC*
	Obtaining land certificate	Drug/alcohol abuse	*Local leader*	*Scheduled meeting with other leader*
	Obtaining birth/death certificate	*Other (specify)*	*Village/Group Meeting*	*Filed legal forms (certificates, wills, etc.)*
	Obtaining marriage certificate		*Other (specify)*	*Memorandum of Understanding (verbal)*
				Memorandum of Understanding (written)
				Resolved–In favor of client
				Resolved—Against client
				(# of people) wrote wills
				Ongoing—no additional visits planned
				Other (specify)

Prior Help:

Problem of Client (narrative):

Client Visit Form

Rights Worker's Name: Lucy

Client information:

Client Name: Betty	Village: Kyevunze Parish: Kikoma Sub-county: Katikamu
Sex: M (F)	Marital Status: Married (Customary)
Age: 45	Occupation: Housewife
Education: Primary	How heard of Rights Worker: Friend

Other Party information:

Other Party (group) Name: Tom	Village: Kyevunze Parish: Kikoma Sub-county: Katikamu
Sex: (M) F	Marital Status: Married (Customary)
Age: 51	Relationship to Client: Husband

Type of Case: Sale of land without consent If "Other," specify: ______

Visit Information:

Date	Duration (minutes)	Action Taken (if "gave legal advice," "counseling," or "other," then specify)	Outcome (if "referred case" or "other," then specify)	Comments
10/3/10	15	Gave legal advice—listened to the problem and began to teach her about the consent clause	Scheduled return visit with client	Partner came into room during the meeting
12/3/10	45	Gave legal advice—told the woman she had to give permission for him to sell the land	Scheduled meeting with other party	
15/3/10	60	Mediation	Resolved in favor of client	Husband realized he was wrong to try to sell the land without his wife's permission

Marital Status	Type of Case		Action Taken	Outcome
Married (Customary)	*Land boundary dispute*	*Marital problem*	*Gave legal advice (specify)*	*Referred cases: (specify to whom)*
Married (Civil)	*Eviction by landlord*	*Domestic violence*	*Counseling (specify)*	*Examples: Local Council courts, Probation and Welfare officers, Police (family and protection unit), Elders, Legal aid clinics, Magistrate court, Administrator General's Office, Sub-county chief, FIDA, ULA, etc.*
Married (Church)	*Eviction by partner*	*Child abuse/neglect*	*Mediation*	
Married (Muslim)	*Land grabbing*	*Custody*	*Check-up visit only*	
Married (Don't Know)	*Fraudulent sale/claim to land*	*Murder*	*Other (specify)*	
Married (Doesn't Specify)	*Sale of land without consent*	*Defilement*		
Single	*Trespass*	*Debt*	**How heard of worker**	*Scheduled return visit with client*
Widow	*Other property dispute*	*Theft*	*Poster*	*Scheduled meeting with other party*
Divorced/Separated	*Inheritance*	*Property damage*	*Radio show*	*Scheduled court date*
Cohabiting	*Writing a will*	*Assault/violence*	*Friend/Family*	*Scheduled meeting with LC*
	Obtaining land certificate	Drug/alcohol abuse	*Local leader*	*Scheduled meeting with other leader*
	Obtaining birth/death certificate	*Other (specify)*	*Village/Group Meeting*	*Filed legal forms (certificates, wills, etc.)*
	Obtaining marriage certificate		*Other (specify)*	*Memorandum of Understanding (verbal)*
				Memorandum of Understanding (written)
				Resolved–In favor of client
				Resolved—Against client
				(# of people) wrote wills
				Ongoing—no additional visits planned
				Other (specify)

Prior Help:

None

Problem of Client (narrative):

10/3/10

Betty is upset that her husband, Tom, wants to sell a farm plot of theirs in a neighboring village. She told him that she did not want to sell the land, but he is still going forward with it. She had heard in a sensitization event that the wife has to give permission before the sale of the land, so she wanted to know if she could legally prevent her husband from selling the land. Her husband is planning to meet with the buyer next week to sell the land. Betty's husband came into the room during the meeting and was mad that I was in the house. We scheduled another time to meet.

12/3/10

Betty summarized her problem again and I gave her more detail about the consent rule, and told her she can legally prevent the sale of the land. I told her that I wanted to talk it over with her husband and try to make him understand before taking any formal legal action.

15/3/10

I met with Tom to discuss the case. I explained the consent rule and told him that Betty had to give permission for him to sell the land. He had never heard of the law. He also didn't realize that Betty was so upset about the sale of the land. He decided that he wouldn't sell the land.

Exercise Using the Client Visit Form to Describe a Case (20 minutes)

Read the first description of a client visit aloud. After you are done reading, ask the participants to identify the important information that is provided in the description. Help the participants fill out the sample Client Visit Form for that case. Make sure that you emphasize that they use the list provided to fill in information about the type of case, the action taken and the outcome.

Read the second visit description aloud. Help the participants fill out the same log with the information for the second meeting for the case.

Visit Descriptions:

(FILL IN TODAY'S DATE)—Christine, a 42-year-old woman from Butenga, came to visit me with a problem. Her husband recently died and his will said that she will inherit the house and a separate 10-acre plot of land. However, her father-in-law, Charles, claims that the separate plot of land is actually his. He only let his son borrow the land to grow crops, but he never gave him the land. Unfortunately, the widow cannot find any documentation that proves that the land was transferred to her husband. I listened to her story for 45 minutes and decided to have a discussion with the father-in-law as soon as I can. Christine works on her farm and takes care of her children. She has no formal education. She heard of me through a friend. Her father-in-law is a 75-year-old widower and does not work.

(FILL IN DATE FOR ONE WEEK LATER)—I visited with Charles, the father-in-law, and Christine at Charles' home. I tried to mediate the issue, but both parties claim that the land is theirs. Neither can produce formal documentation that the land belongs to them. I decided to refer them to the Local Council for help. I will follow up with Christine after she visits the Local Council.

Exercise Role Play for Client Visit Form (1 hour)

The following role play will give the community rights workers experience in filling out the Client Visit Form. Separate the rights workers into groups of two—one person will be the "rights worker" in the role play and the other will be the "client." You will give the "client" a piece of paper that will give information about the case that s/he will need to tell the "rights worker." You will give the "rights worker" a piece of paper that will give information about the action that s/he will take with the "client." Stress that the "client" should not share his/her piece of paper with the "rights worker" and the "rights worker" should not share his/her paper with the "client." While the "client" is explaining his/her problem to the "rights worker," the "rights worker" should be taking notes on the second page of the Client Visit Form as s/he would in a typical client visit. The "rights worker" will give advice to the "client" as indicated on the sheet of paper. When the role play is complete, the "rights worker" will transfer the important information in his/her notes to the front of the form. The "client" and the "rights worker" can work together on this.

Note to Facilitator: Be sure that the participants understand the rules of this role play. Make sure that the "client" does not share his/her piece of paper with the "rights worker" and the "rights worker" does not share his/her piece of paper with the "client." This is supposed to be as similar as possible to a real client visit so the participants get experience listening, giving advice and filling out their forms. If the person playing the client is male, the client is Sam; if the person playing the client is female, the client is Susan.

THE CLIENT (Susan if client is female/Sam if client is male)	
I saw a poster about you and thought you could help me. My father recently passed away, and my brother, Herbert, and I inherited his land in Bweyeyo. There is one borehole on the land that is situated on my brother's plot. However, my brother and I do not get along and he will not allow me to use the borehole, even though that is the only water source in the vicinity. I want to know if I can force him to allow me to use the borehole. I have my father's will that says that we should split the land evenly, and I think that means that we should both be able to use the borehole. You are the first person I have come to for help. Please can you help me?	
Additional Information:	
Client:	***Other party:***
Marital status: widowed	*Brother's Age:* 38
Education: P7	*Brother's marital status:* Married
Occupation: sells clothing at market	
Age: 35	

THE RIGHTS WORKER
I listened to Susan/Sam's problem and decided that I wanted to talk with the brother before taking legal action. I scheduled a meeting for the next day with both Susan/Sam and the brother.

Give the participants 25-30 minutes to go through the role play. After they are done, discuss what should be written in each box of the Client Visit Form. You can do this by printing out or drawing a large version of a blank Client Visit Form that you hang on the board in the front of the room. Have a volunteer fill out the box as they have done on their form and discuss with the rest of the participants. If you cannot print out or draw a large version of the form, you can go around the room and have the participants tell you what they have written in each of the boxes.

Once you have gone over the correct way to fill out the form for the role plays, ask the participants how they would alter the form for the following situations. This will test if the participants understand what to do if there is a second meeting for the same case or if the same clients bring a second case to the community rights workers.

- Suppose you meet with Herbert and Susan/Sam the next day. After two hours of mediation, they decide that they can share the borehole. How will you fill out the form?

  (*Answer: you should record any relevant notes on the back of the form with the date and fill out the next line in the "Visit Information" with something like this:*

Date	Duration (min)	Action Taken	Outcome	Comments
[Tomorrow's date]	60	Mediation	Resolved—In favor of the client	They decided to share the borehole

- Suppose after this case ends, Susan/Sam comes back to you to discuss how to write a will. How will you fill out the form?

  (Answer: They should start an ***entirely new*** *Client Visit Form)*

Discussion Consistency in Filling out Forms (20 minutes)

Consistency is absolutely necessary to quickly and efficiently turn monitoring data on forms into useful information. Organizations need to combine and compare the reports from all the rights workers to say something meaningful about the organization as a whole. If the forms are all completed with consistency, it is easy for the organization to combine the information from everyone's forms. If, on the other hand, each rights worker writes a detailed narrative report about each of his/her clients, it is more difficult to compare outcomes and actions across rights workers. Sometimes rights workers may even leave out some important information or not provide enough detail to make the report useful.

Let's go over an example, so you can see the importance of consistency. Suppose three community rights workers speak with the same client and these are the descriptions that they provide.

> *Community Rights Worker A:* A woman in the community is complaining that her neighbor has been growing crops on her plot of land, but her neighbor claims that the land is his. She wants me to help her enforce the boundary of her property. I scheduled a meeting with the other property owner.
>
> *Community Rights Worker B:* A woman accused her neighbor of trespassing on her property.
>
> *Community Rights Worker* C: A 55-year-old, recently widowed woman in my village of Butenga traveled to my house with her daughter to discuss a problem with me. In the last season, her neighbor grew beans and sweet potatoes on her plot of land. When she approached her neighbor about the issue, her neighbor said that the land where he was growing the beans and sweet potatoes actually belonged to him. However, she explained that he had never tried to grow crops on that land when her husband was still alive. They had an argument over who owned that portion of land and then the woman came to me to try to remedy the situation. Since this is a case about the boundaries of land, I scheduled a meeting with the other property owner.

It is difficult to tell that the three descriptions are about the same case. Community Rights Worker C gave the most detail about the case, but some of the detail is not important for the monitoring. Community Rights Worker B did not give enough detail and did not note the action that s/he took. The descriptions also differed on categorizing the type of case. Community Rights Workers A and C categorized the case as a boundary dispute, while Community Rights Worker B did not note any boundary issues and categorized it as a trespassing case. If all three of these rights workers had completed a monitoring form that asked for specific information (like type of case and action the rights worker took) and allowed them to choose from a menu of responses, it is more likely that their accounts would be similar and that there would be neither too much or too little detail.

The lists of choices in the Client Visit Form for marital status, type of case, action taken and outcome encourage consistency. Community rights workers can choose the description from each list that best fits their case instead of every rights worker writing out a short description of the case using different words that might leave out information, include too much information, or will take too much time and cause confusion for someone analyzing many Client Visit Forms. Only allowing a certain number of choices to answer a question further promotes consistency, as there is less chance that two people will record different answers to mean the same thing. A good list of choices will cover most cases that arise even if the details of cases are different.

Exercise Extra Practice for Consistency in the Type of Case (30 minutes)

At first it may be difficult for the rights workers to classify the type of case based on the choices listed on the monitoring form. In some instances different rights workers may even want to classify the same case two different ways. *Therefore, it is important for them to reach a common understanding of how to classify cases from the choices given.* Read the three following short case descriptions. For each description, ask the participants to classify the type of case that they would record on their monitoring form. Direct them to choose a response from the list at the bottom of the form. They do not need to fill the rest of the form.

Case Description A: A man in the village is complaining about his neighbor growing crops on his land. His neighbor recently started building a fence around the crops. When the man tried to stop him, his neighbor claimed that the land is actually his. The man wants to stop his neighbor from using his land. Neither man has documentation that describes the boundaries for the land under dispute.

Case Description B: A woman in the community is having problems with her husband. He comes home from the local bar late at night, often drunk, and starts arguments with her. He tells her that her cooking is bad, that she doesn't clean the house enough and that she does not please him in bed. When she tries to argue with him, he hits her. He also tried to hit their 12-year-old son, but she always stops him. She doesn't know what to do.

Case Description C: The husband of a local woman recently passed away. He had a pension through his job that should be transferred to her upon his death. However, when she went to the employer to get the pension transferred to her name, they wanted the death certificate of her husband, which she did not have. She needs help to secure the pension.

Discussion Fill Out Forms Immediately After the Client Visit or Event (5 minutes)

Explain to the participants that it is easy to forget details from a client visit or sensitization event if they are not written down immediately. This is especially true when they see more than one client or if one client gives them more than one case before they fill out the form, since they might confuse the two cases. When a rights worker is doing one activity, s/he may be completely focused on it. However, when s/he starts a second activity, s/he may forget the details of the first even after a short time. Rights workers must fill out the monitoring forms as quickly as possible after the event is finished.

Exercise Filling Out Forms Immediately After Visit or Event (5 minutes)

This is a small memory exercise to demonstrate that we can easily forget important details in just a short time if they are not recorded.

1. Tell the participants that you are going to tell them your phone number out loud (you can use a false number), but that they are not to write the number down or enter it into their mobiles.
2. Say the phone number out loud one time. Make sure no one is recording it.
3. Ask the group to repeat the phone number back to you. Make sure no one is recording it.

4. Now tell the participants that you are going to tell them another phone number out loud and that they may not write or enter this number either. Choose a phone number that is not similar to the first one you gave them.
5. Say the second number out loud. Make sure no one is recording it.
6. Ask the group to repeat the second phone number back to you. Make sure no one is recording it.
7. Now ask them to repeat back your phone number. This will be more difficult because people have been concentrating on remembering the second number and did not have the first one written down.

Background Monthly Client Visit Log

Because the community rights workers will keep the Client Visit Forms as a record of their cases, they also need a way to report information about their client visits to their organization. The **Monthly Client Visit Log** can be used to report information about client visits on a monthly basis.

Discussion Summarizing Data with the Monthly Client Visit Log (30 minutes)

The Monthly Client Visit Log requests much of the same type of information as the Client Visit Form to make it as easy as possible to transfer the data from one form to another. Each row corresponds to a visit that occurred during the month. To transfer the information from the **Client Visit Form** to the **Monthly Client Visit Log**, the community rights worker needs to go back through their Client Visit Forms and set aside the ones that have an entry under "*Visit Information*" that occurred during that month. Then, they will enter the name of that client, demographic information, and type of case from the top of the Client Visit Form in the *"Visit Information"* that corresponds to the meeting that occurred during the month in the Monthly Client Visit Log. If they visited with the same client more than once in a month, they will write the information on multiple lines. The client name, demographic information and case type will be the same for those lines.

1. Briefly revisit the different information categories on the Monthly Client Visit Log. They are all contained on the Client Visit Form, so you need not go into much depth. Refer to the explanations in the Client Visit Form section of the training for clarification of what should be included in each box.

2. Explain again that for the columns "Type of Case," "Action Taken," and "Outcome," there are categories at the bottom of the form that they could choose from as the best description. These are the same categories that are found at the bottom of the Client Visit Form, so copying what they had written in that form will work.

3. Discuss the logistics of completing the form with the community rights workers. They should fill out the form according to the guidelines above and using the list of potential responses when applicable. They should collect all of the Client Visit Forms that have a visit during the month in question, and then fill out the information about the visit in the **Monthly Client Visit Log** exactly as it appears on the Client Visit Form. The organization should establish a time with the rights workers each month to collect these forms.

Exercise Practice Transferring Information from CLIENT VISIT FORM to MONTHLY CLIENT VISIT LOG (30 minutes)

Split the participants into groups of two or three. Have the groups work together to fill out the **Monthly Client Visit Log** using the filled out Client Visit Forms that were completed in the above exercises. Because all the exercises use dates within the month, they should have a number of lines to fill out. After they have filled out their **Monthly Client Visit Log,** discuss what should be written in each box. You can do this by printing out or drawing a large version of a blank form to hang on the board in the front of the room. Have a volunteer fill out the box as they have done on their form and discuss with the rest of the community rights workers. If you cannot print out or draw a large version of the form, you can go around the room and have the participants tell you what they have written in each of the boxes.

Monthly Client Visit Log

Rights Worker's Name:	Month:

Date	Client Name	Village, Parish, Sub-county	Sex	Age	Marital Status	Education	Occupation	Type of case (if "other," specify)	Action Taken (specify if appropriate)	Outcome (specify if appropriate)	How heard of rights worker	Comments
			M F									
			M F									
			M F									
			M F									
			M F									

Marital Status
Married (Customary)
Married (Civil)
Married (Church)
Married (Muslim)
Married (Don't Know)
Married (Doesn't Specify)
Single
Widow
Divorced/Separated
Cohabiting

Type of Case	
Land boundary dispute	*Marital problem*
Eviction by landlord	*Domestic violence*
Eviction by partner	*Child Abuse/neglect*
Land grabbing	*Custody*
Fraudulent sale/claim to land	*Murder*
Sale of land without consent	*Defilement*
Trespass	*Debt*
Other property dispute	*Theft*
Inheritance	*Property damage*
Writing a will	*Assault/violence*
Obtaining land certificate	*Drug/alcohol abuse*
Obtaining birth/death certificate	*Other (specify)*
Obtaining marriage certificate	

Action Taken
Gave legal advice (specify)
Counseling (specify)
Mediation
Check-up visit only
Other (specify)

How Heard of Rights Worker
Poster
Radio show
Friend/Family
Local leader
Village/Group Meeting
Other (specify)

Outcome
Referred cases: (specify to whom)
Examples: Local Council Courts, Probation and Welfare officers, Police (family and protection unit), Elders, Legal aid clinics, Magistrate court, Administrator General's Office, Sub-county chief, FIDA, ULA, etc.
Scheduled return visit with client
Scheduled meeting with other party
Scheduled court date
Scheduled meeting with LC
Scheduled meeting with other leader
Filed legal forms (certificates, wills, etc.)
Memorandum of Understanding (verbal)
Memorandum of Understanding (written)
Resolved—In favor of client
Resolved—Against client
(# of people) wrote wills
Ongoing—no additional visits planned
Other (specify)

Background Community Sensitization Log

In addition to client visits, the community rights workers also hold community sensitization events to teach the community about the law and its applications. The form below could be used to collect monitoring information about community sensitization events. Each column corresponds to a different type of information that the organization wants the rights workers to collect. This form is designed to record all community sensitization events that occur in a given month. The rights workers should fill out one row for each event.

Like the Client Visit Forms, the Community Sensitization Log has categories at the bottom of the form that the community rights workers will select from to fill out some of the columns.

Discussion Record Community Interactions in the Community Sensitization Log (45 minutes)

1. Have the participants read all of the different "information" categories and explain what they think would go in that box. The table on page 23 has an explanation of what information should be recorded in each box. As they go through the different types of information, clarify their explanations using the ones in the table.
2. Explain that for the columns "Topic of Event," "Mobilization Method," "Training/Activity" and "ICRW/ULA Handout Used," there are categories at the bottom of the form that they could choose from as the best description. Ask the participants to read the lists of categories. Because it is very important for consistency that they use the words on these lists, you need to make sure that the community rights workers understand exactly what is meant by each word.
3. Discuss the logistics of completing the form with the community rights workers. They should fill out the form according to the guidelines above and using the list of potential responses when applicable. It is important that they fill out this form during the sensitization event or as soon after the event as they can. The organization should establish a time with the rights workers each month to collect these forms.
4. Sometimes community rights workers may hold their own meetings and events to reach out to the community. Sometimes they may be invited to speak at a meeting or event that someone else is holding, even if only for 15 minutes or so. Both situations should be captured in the Community Sensitization Log. The time in the "Duration" box should be for how long the event dealt with topics relevant to the rights worker.

Information	Description
Date	Record the date of the sensitization event.
Duration	Record the length of the sensitization event in minutes. If you do not have a clock, estimate the time to the best of your ability. If your sensitization was part of a larger meeting on a different topic, count just the time that was relevant to your topic.
Village	Record the village and sub-county where the sensitization event was held.
Topic of Event	Choose from the “Topic of Event” list at the bottom of the form to classify the topic that the sensitization event was about. Record only one topic in the space provided.
Mobilization Method	Choose from the “Mobilization Method” list at the bottom of the form to classify the way that you brought together the audience for your sensitization event. Record only one method in the space provided.
Specific Training/ Activity	Choose from the “Training/Activity” list at the bottom of the form to indicate how you taught your audience about the topic. Record all trainings or activities that were used in the space provided.
Number of Participants	Record the number of males and females that attended the event. Write the number of males under “M” and the number of females under “F.” If it was a large audience, estimate the numbers.
Issues Arising from Participants	Record any issues that arose during the sensitization events, questions asked that you couldn’t answer, disruptions, etc.
Lessons Rights Worker Learned	Record any lessons learned through the sensitization events, instruction methods that worked well/poorly, locations and times that worked well/ poorly, etc.
Handouts Used	Choose from the “ICRW/ULA Handout Used” list at the bottom of the form to indicate if you used any handouts in preparation for the sensitization event or during the event. Record all that applies in the space provided.
Other Rights Workers/ Organizations/Leaders Involved	List the other organizations or leaders that were involved in the sensitization event (if any). Be sure to specify the name of any other rights worker or organizations involved, and the role of any leader involved. Record all rights workers/organizations/leaders involved in the space provided.

Sensitization Event Log

Rights Worker's Name:	**Month:**

Date	**Duration** (minutes)	**Village, Parish, Sub-county**	**Topic of Event**	**Mobilization Method** (If "talks at public gathering," specify)	**Specific Training/Activity** (all that apply)	**No. of participants M**	**F**	**Issues Arising from Participants**	**Lessons Rights Worker Learned**	**Handouts used**	**Other right workers** (name)**/ organizations** (name)**/Leaders involved** (role) (all that apply)

Topic of Event		**Mobilization Method**	**Training/Activity**	**Handouts used (from ICRW/ULA's *Property Rights and Gender in Uganda: A Training Toolkit*)**	
Marriage, separation and divorce laws	*Human rights*	*Open air meetings (event held by rights worker)*	*Role play*	*Women's Rights and Property Rights in the Constitution*	*Land Ownership Systems in Uganda*
				Uganda's Constitution and Your Rights	*Women's Rights in the Land Act*
Historical Uganda Land Law	*Women's rights*	*Talks in school*	*Question and Answer*	*A Woman with Property*	*Land Management Institutions*
Land Act and Amendments	*Children's rights*	*Talk radio*	*Lecture*	*Women and Inheritance*	*Land Dispute Resolution Institutions*
Marriage and property rights	*Court system*	*Talks at public gatherings (specify group/gathering)*	*Case stories*	*Wills and Women*	*Important Land Documents*
Landlord and tenant relations	*Dispute resolution*		*Song*	*If the Deceased Leaves a Will*	*Informal Dispute Resolution Institutions*
New laws and implications	*Will writing*	*House to house visit*	*Dances*	*If the Deceased Does NOT Leave a Will*	*Formal Dispute Resolution Institutions*
Land management institutions	*Land certificates*	*Posters (used to sensitize)*	*Handouts*		*Role Play: Mary and Gilbert*
Inheritance and succession laws	*Other certificates*	*Other (specify)*	*Other (specify)*	*Practices for a Church Marriage*	*Women's property rights at separation and divorce*
Land tenure systems	*Other (specify)*			*Practices for a Civil Marriage*	*Law on Separation and Divorce: Church or Civil Marriage*
				Practices for a Customary Marriage	*Law on Separation and Divorce: Customary Marriage*
				Practices for an Islamic Marriage	*Law on Separation and Divorce: Islamic Marriage*
				Important Marriage Documents	*Role Play: Rose and Joseph*

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