



**US** BY THE PEOPLE  
FOR THE PEOPLE  
WITH THE PEOPLE

Priority Life Experiences

*Birth to Five*

# Benefits Bundle: Site Visit Training

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# What's included in this training

1. Visit Goals
2. What to Expect
3. Team Roles
4. Note Taking Procedures
5. Site Context



# Visit Goals



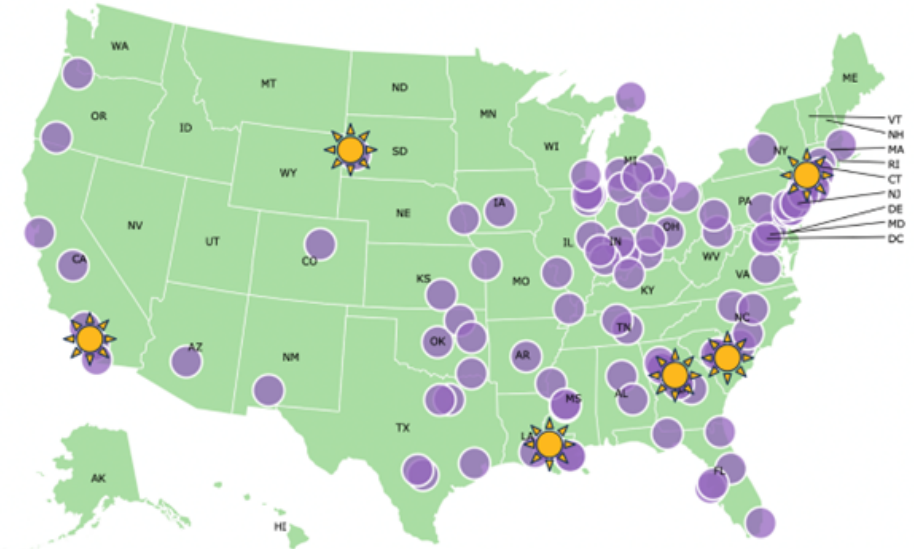
# Overview

Thanks for joining this effort!

We are a small, Federal design team partnered with the Health Resources and Services Administration’s [Healthy Start](#) program to deliver a [“Benefits Bundle”](#) pilot.

Our main goal for site visits is to better understand **how the Benefits Bundle is being deployed** at the ground-level. In turn, this will give us context and insights to improve the Benefits Bundle service for Healthy Start sites.

Sites Selected 



**Table 1.** Six pilot sites have been selected.

The Center for Black Women's Wellness, Inc.	Atlanta	GA
Great Plains Tribal Chairmen's Health Board	Rapid City	SD
Family Road (of Greater Baton Rouge)	Baton Rouge	LA
Pee Dee Healthy Start, Inc	Florence	SC
Northern Manhattan Perinatal Partnership, Inc.	NYC	NY
SHIELDS for Families	Los Angeles	CA



# Visit Goals

**Priority #1: Ensure visits are mutually beneficial, centering the interests of the Benefits Bundle sites and their families.**

- Connect and design ***with*** families to gain insight into the family's experience and their ideas for the future.
- Connect and design ***with*** Benefits Bundle navigators to identify what's working and opportunities for the future.
- Continued to ***move in partnership*** with Healthy Start sites and their communities.



# Design Principles

*“It all goes back to that table!”*

<b>From</b>	<b>To</b>
Making decisions for people with lived experience	Making decisions with people with lived experience
Valuing professional expertise above all	Valuing professional and lived experience equally
Seeing marginalised people as a burden	Seeing marginalised people as resilient, creative and capable
Colonising, heteronormative and ableist systems	Compassionate systems that see and respond to dimensions of difference
Believing that resources are scarce to make change	Seeing an abundance of experience, ideas and energy for change
Focusing on ‘consumer’ councils and committees	Embedding participation in everyday practice
Rushing to solutions	Slowing down to listen, connect and learn



# Design Tenets

From Rachael Dietkus' [Creating Space in Communities with a Trauma-responsive Lens](#)

## Slow things down

- Slowing down is an opportunity for you to build rapport and trust, consider others' experiences and emotions, and set clear goals for the interaction.

## Engage in active listening

- This technique is the key to a productive and supportive interaction.

## Get practical

- While listening is essential, it does not always provide tangible results. Being clear and honest are key.

## Be comfortable in your role

- There are systemic challenges that may be difficult for you to influence in your role. To the contrary, you may be in a role with significant influence for those at the local level. Compassion really does change the experience for people.



# What to Expect





# What To Expect

## Deep conversations

- Many of the topics that come up during site visits may prompt emotional responses. This is normal. As a designer or support staff, it is important to remain neutral and supportive if a situation were to escalate.

## Hesitancy or Skepticism

- We are the outsiders in the communities we enter. Especially with Feds or government-affiliated projects, trust and buy-in is not always guaranteed. Take time to build rapport and care when engaging with community members.

## Limited Digital Literacy

- Assume to work with people with limited digital literacy and technology skills. Even if this may not be true of all participants, setting the floor low will ensure everyone can equitably participate.



# Team Roles

## One team, one dream! How should I contribute?

Designers can wear multiple hats. For these visits, roles include:

- **Facilitator.** This person facilitates the discussion, attuned to the learning goals and questions for exploration.
- **Notetaker.** This person is responsible for capturing the official notes of the session.
- **Timekeeper.** This person is responsible for ensuring sessions are completed within the time frame.
- **Observer.** This person(s) is not facilitating the conversation, nor have official note-taking responsibilities but still plays a critical role in helping the team synthesize learnings and continue the design process. It is highly encouraged they take notes and at times, the facilitator may call on them to share input and/or ask any follow-up questions. They may also review the notes to clarify any details or discrepancies.



# Assigning Team roles

**At the visits, it may be more fluid.** Remember check-in with each other, especially for the sit-down sessions, to ensure: 1) notes are being captured and 2) someone is keeping an eye on the clock (and nudging the team’s awareness as needed).

## Example Roles

Role	Session Type		
	Family Group Session	Family 1:1	Navigator Group Session
Facilitator / Notetaker	Whitney	Alex	Alicia
Notetaker / Notetaker	Sam	Whitney	Alex
Timekeeper	Alicia	Sam	Whitney
Observer(s)	Alex	Alicia	Sam

Ensure that you are comfortable with your role! You may want to switch it up depending on the site or session type. Some sessions may have multiple note-takers due to language.



# How do I engage in the session?

This will vary on whether you are there in-person OR participating remotely via teleconference, but some general guidance includes:

- **Be helpful.** This could mean closing a door to limit sound coming in a room or seeing and fulfilling a need to bring more chairs into a conference room. Maybe you fill up people's waters for them or volunteer to be the time keeper.
- **Be mindful of cameras.** If virtual, turn your camera on at the beginning so you can participate in introductions, and then turn your camera off and mute yourself for the rest of the time. If in-person, let the team know if you plan on taking pictures and if you want a picture of a person, gain consent and use permissions. If using a digital note-taker or taping the session, ensure you let participants know they are being recorded and have the appropriate media/consent forms in place.
- **Be active listeners.** Observation requires intense focus. When taking notes, identify the actual words and actions you hear AND see, versus taking notes of your interpretation of these notes. If this presents a challenge, format your note-taking template with an area strictly for notes and another area strictly for your insights, questions and/or general comments.



# Participant Care

## **Prioritize “Do no harm”**

As designers or visitors to sites, it is a privilege for us to have families, navigators, and sites show up for us to engage with. We are here to listen to their needs, concerns, and ideas as they share with us. Reflect on how your approach or presence may cause burden, discomfort to participants who show up. Is it asking sensitive or repetitive questions? Is it your position (power)? While we cannot change some of these things, being mindful and taking proactive steps to minimize harm is crucial.

## **Value Transparency**

Communicating clearly is key. Especially if there are sensitive topics or subjects, being open, responsive, and honest to participants goes a long way.

## **Be Supportive**

Our sessions may evoke a wide range of emotions, and it’s okay to acknowledge the emotions in the room, such as through personal touch or gestures, as appropriate.



# Facilitator Care

## Take care of yourself!

As facilitators, we're here to support the participants wholeheartedly. Yet, we can't be fully present for them if we're not tending to our own well-being. Prioritize self-care; get enough rest, stay hydrated, and take breaks when needed. Practice self-compassion and seek support from your peers or supervisor when necessary. Remember, your own well-being directly impacts the quality of your facilitation, and in turn, the experience of the participants.

## Look out for your team

Embrace the "One Team, One Dream" spirit. Support and uplift each other. Recognize that sessions can be challenging, impacting us all in different ways. Take the time to debrief with your team, and be open about how you're feeling. If something needs to change for the next session, let's adapt together. We're all here for each other, ready to listen, support, and grow as a team. Remember, our strength lies in our unity, and by sharing our experiences, we become even stronger. Together, we can overcome any challenge.



# Note Taking Procedures

**This is a *critical role*. Without your notes, the legacy of these visits...is mute.**

- All notes and templates are stored in the Google Drive Folder: [Notes](#)
  - ***Please*** check that you have access to this folder!
- Within 3 business days, share the final (cleaned) notes to the BB Slack channel
  - If you do not have access to the Slack BB Channel, please send to a 0-5 team member

## Digital Notetakers

Some sites may consent to digital note taking apps. In this case, it is important to ensure that the app is capturing information correctly, and that you have the ability to make edits as needed. If you find that the presence of a digital notetaker interferes with the integrity of the session (e.g., people are not comfortable speaking), please resume traditional note taking.

## Synthesis

Once notes are final, input the individual feedback onto a Mural board for further synthesis to generate insights, themes, and key takeaways.



# How should I capture notes?

## **BEFORE**

- Identify and review the template ahead of time.
- Check-in with the facilitator to see if they plan to make any adjustments. This may especially be needed if the time available or number of participants changed.

## **DURING**

- Capture notes in as real-time as possible, aim for verbatim.
- If the facilitator skips a question or modifies it, please try and capture that (eg., type the question actually asked and marked skipped questions as SKIP).

## **AFTER**

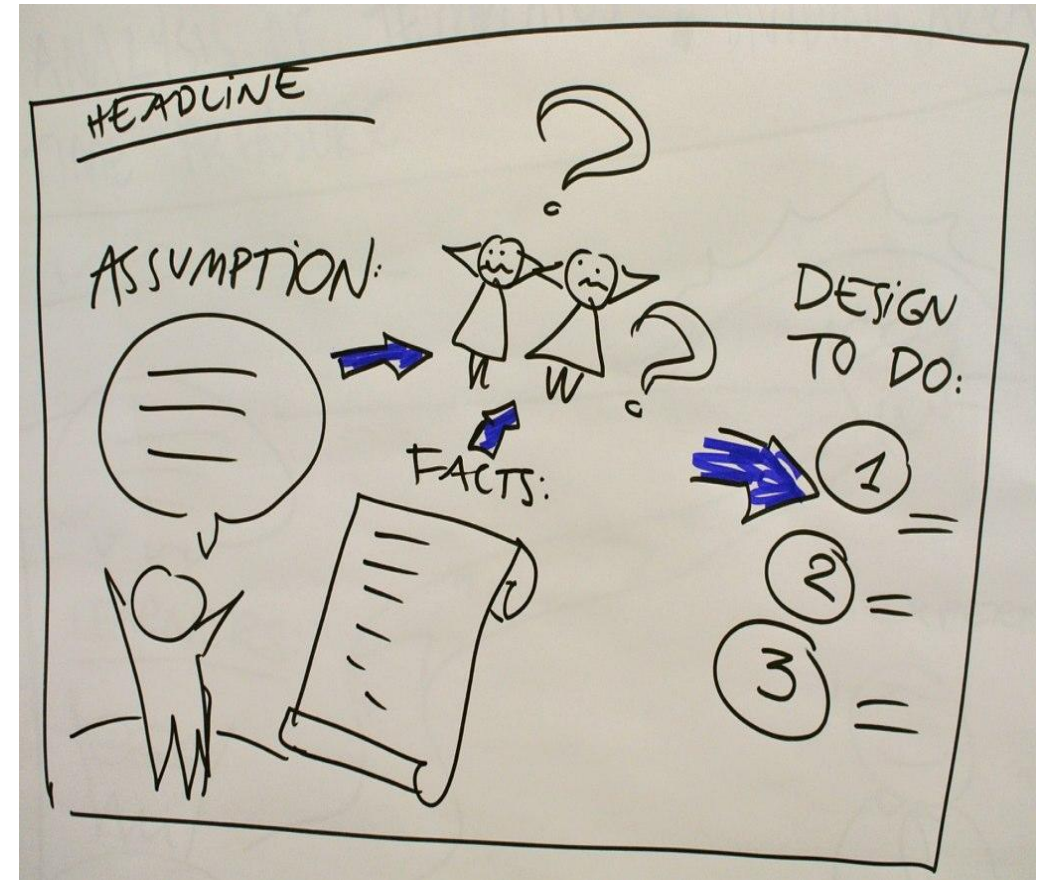
- When done, review and clean up the notes by adding formatting:
  - *Italics* = participant quotes
  - **Bold** = A question or prompt from the facilitator
  - [descriptive text] = Notetaker or Facilitator notes to synthesize a conversation OR describes body language or activity in the room]
  - Highlight = a particularly salient part of the session that directly speaks into the pilot design and session goals
- Note any follow-ups at the bottom of each session.
- Do a final review and ensure no PII is housed in the notes file.





# Preparing for your visit

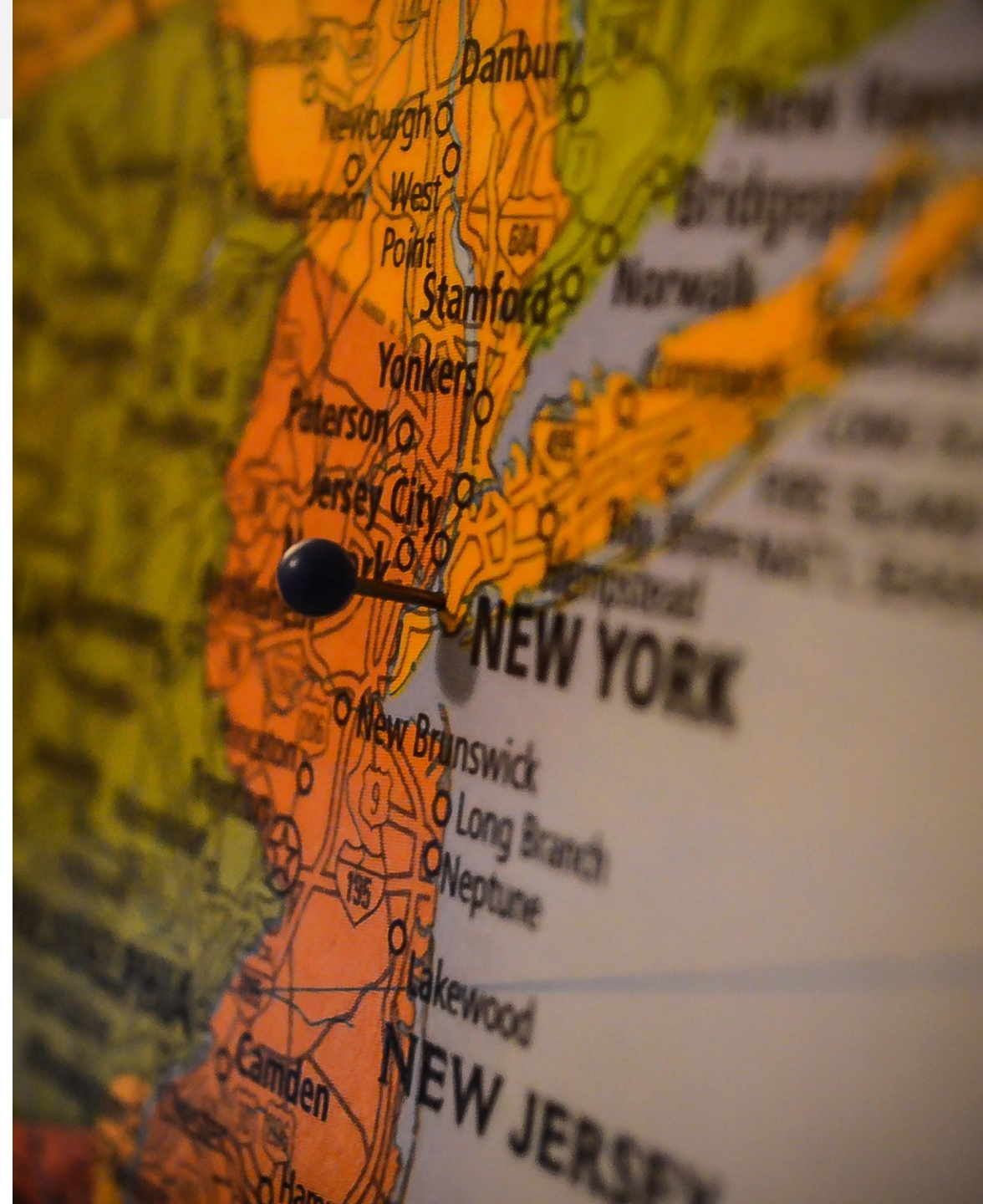
- A [design plan](#) has been developed to detail the general overview of the site visits
- Familiarize yourself with the “run of show” in each design guide
  - [Family Groups](#)
  - [Family 1:1](#)
  - [Navigators](#)
- Note: We will be using the Rapid Iterative Testing and Evaluation (**RITE**) approach for our visits. Based on what we learn from visits, we’ll take that feedback and inform how we structure the next visit. So always review the guides prior to each visit!





# Travel Itinerary

- The source of truth for our travel is housed in [Mural](#)
  - Please view this for real time updates
  - Add your travel details under each specific trip
- Ensure your team is aware of where you are!
  - Update your calendar with your travel dates and itineraries
  - Share your contact information in case of an emergency





# Final Checklist

**Before you leave, ensure the following:**

- Sites are aware of your final travel dates
- Sites confirm that participants are available during the designated time slots
- You've coordinated arrival and departure arrangements (e.g., shared transportation)
- You have all travel essentials (e.g, passport/ID)
- Session materials are confirmed (e.g, pens, papers, hand-outs), whether you are bringing them, or if they are on-site





# Site Context



# Pee Dee, South Carolina: Pee Dee Healthy Start Inc.

**PDHS** is a rural site that covers seven (7) counties. The USDS/OMB/HRSA team will be visiting the PDHS main office.

**Location:** 314 West Pine Street Florence, SC 29501

**Point of Contact:** Madie Robinson, 843 260-2577

## Logistics

- Parking lot available, no pass needed
- Masks may be required
- Casual dress code
- PDHSI office is less than 10 minutes from downtown Florence



**Family, Relationship, and  
Marriage Education Works (FRAMEWorks)**



# Atlanta, Georgia: Center for Black Women's Wellness (CBWW)

## [Description]

### Location:

### Point of Contact:

### Logistics

- Parking lot available, no pass needed
- Masks required
- Casual dress code
- PDHSI office is less than 10 minutes from downtown Florence





# Harlem, New York: Northern Manhattan Perinatal Partnership (NMPP)

## [Description]

### Location:

### PDHS Point of Contact:

### Logistics

- Parking lot available, no pass needed
- Masks required
- Casual dress code
- PDHSI office is less than 10 minutes from downtown Florence



# Los Angeles, California: SHIELDS For Families

## [Description]

## Location:

## Point of Contact:

## Logistics

- Parking lot available, no pass needed
- Masks required
- Casual dress code
- PDHSI office is less than 10 minutes from downtown Florence





# Turtle Mountain, North Dakota: C

## [Description]

### Location:

### Point of Contact:

### Logistics

- Parking lot available, no pass needed
- Masks required
- Casual dress code
- PDHSI office is less than 10 minutes from downtown Florence