

INTRODUCTION

Background

The National Department of Health of South Africa has introduced various initiatives to respond to the HIV and AIDS epidemic and has scaled up all efforts on HIV and AIDS prevention, care and support, including the provision of antiretroviral treatment.

The Operational Plan for Comprehensive HIV and AIDS Care, Management and Treatment for South Africa (thereafter referred to the Comprehensive Plan) was approved by the South African Cabinet in November 2003.¹ Subsequently, the Monitoring and Evaluation Framework was developed to monitor implementation of the plan.

The Monitoring and Evaluation Framework outlines the information requirements of input, process, output, outcome and impact indicators that were developed through a consultation process with various stakeholders.

Service providers and managers at all levels of the health system need information in order to plan and manage HIV and AIDS services appropriately and to monitor and/or evaluate the implementation of national and local plans. A crucial ingredient of Monitoring and Evaluation is the availability of good quality, timely and complete data.

It is therefore essential that knowledge and skills on monitoring and evaluation be enhanced amongst staff at various levels of the health care system both in order to monitor patient care and evaluate the implementation process of the Comprehensive Plan.

This manual provides an overview of HIV and AIDS, the National ART Treatment Guidelines and the Comprehensive Plan as background and rationale for the training on monitoring and evaluation. The monitoring and evaluation component is structured around the information cycle model and includes data collection, data processing, presentation of information and use of information for action.

Target Group

- Staff responsible for supervision of accredited service points
- Staff rendering care, management and treatment services
- Staff involved in handling and management of data
- Data capturer from each service point
- Programme and Project managers.

This is a diverse group with different experiences and skills. This course attempts to meet the needs of all the groups but accepts that some of the course content will be more relevant to some groups than to others.

¹ In this manual, the Operational Plan for Comprehensive HIV and AIDS Care, Management and Treatment for South Africa will henceforth be referred to as the "Comprehensive Plan".

Course overview

The four day training course comprises three main content areas:

- ▶ Background: HIV and AIDS
- ▶ The Comprehensive Plan, National ART Treatment Guidelines
- ▶ Monitoring and Evaluation.

There are 10 training sessions:

1. Welcome and introduction
2. HIV and AIDS
3. Confidentiality
4. The Comprehensive Plan and National ART Treatment Guidelines
5. Introduction to Monitoring and Evaluation
6. Indicator Sets and Data Element Sets
7. Data Collection
8. Processing Data: Quality and Analysis
9. Presenting Information
10. Interpreting and Using Information for Action

Each session is structured as follows:

- session heading
- aim of the session
- learning outcomes for the session
- session plan and timing
- preparations for the session
- activities for each session

Activities consist of facilitator presentations and group work. Facilitator presentations contain a narrative accompanying a PowerPoint (slideshow) presentation. Group work activities contain detailed instructions for both facilitators and the participants.

Where relevant, indicator and data tables as well as answer sheets, are contained in the annex to a session of the facilitator's manual.

A course day is structured around three time periods of two hours each: early morning period, late morning period and afternoon period. Where possible, the course sessions are contained within a single two hour timeslot; but this is not possible for all sessions. Days 1 and 4 include only two time periods, in order to make provision for travel time.

Teaching materials

Teaching materials include a facilitator's manual, a participant's manual and an accompanying CD. The CD contains PowerPoint presentations for all sessions, electronic copies of relevant national documents and additional resource/reading materials.

Course evaluation

Pre-test and post-test questionnaires are completed by all participants on the first and last days of the course respectively. The tests are handed in anonymously but participants are requested to write a unique identifier on pre- and post test questionnaires in order to assess individual improvements in knowledge. The perceptions and feelings of participants about the course will be assessed using an anonymous daily evaluation sheet or a mood meter. At the end of the course, a detailed course evaluation questionnaire will be completed by all participants.

Tips for facilitators

- Recommended reading:
Heywood, A. & Rohde, J. Undated. Using information for action. A manual for health workers at facility level. The Equity Project.
- At the start of each day, provide a brief overview of the day's activities.
- At the end of the day, present a summary of key issues addressed during the day.
- Give a quick wrap-up summary to conclude each group work activity.
- Have a few quick energisers ready – use these to break long sessions.
- Be aware of the timing of activities – the session plans provide guidelines but timing should be adapted to each situation.
- The manual provides detailed instructions for facilitator presentations and group work. Facilitators are, however, free to adapt teaching methods as preferred, provided the course content is covered and the session outcomes are achieved.
- Questions arising that cannot be answered at the time due to time constraints, can be left in the "parking bay" until time allows for further discussion. The "parking bay" is a sheet of newsprint taped to a wall.

Course preparations

The following is a checklist for effective preparation for training workshops in the provinces.

4 – 6 weeks prior to the training workshop		
ACTIVITY	DETAILS	TICK
Confirm training dates with the province		
Confirm the venue for training	· Use Regional Training Centres or Provincial facilities as far as possible to reduce cost	
	· Ensure that the venue is suitable in size to accommodate the number of trainees and sufficient space for group work	
	· Ensure availability of flip chart stands, XGA (1024x768 resolution) data projector, screen / wall for projection, sufficient power outlets, extension cords, double adapters	
Ensure that Province send formal letter to participants	Formal invitation should contain the following information as a minimum:	
	· Date of training	
	· Venue	
	· Target group	
	· Participants should bring copies of own data, forms, registers, local policies and procedures	
	· Participants should bring calculators	
	· Date of confirmation of attendance (RSVP)	
If catering is required, make arrangements		
Make travel and accommodation bookings for facilitator.		
Start your own preparation for the workshop by ensuring that you are familiar with the content of the following;	· National ART treatment guidelines	
	· Operational Plan for Comprehensive HIV and AIDS Care, Management and Treatment for South Africa	
	· National strategic plan for HIV/AIDS/STD's 2000 -2005	
	· Monitoring and Evaluation Framework for the Comprehensive HIV and AIDS Care, Management and Treatment Programme for South Africa	
	· National data flow and data management protocol	
	· Technical notes: Indicators, numerators and denominators for the operational plan (NDoH 2004)	
	· National Patient forms, guidelines for completions as well as Provincial forms in use (if different from National forms)	
	· Basic epidemiology of HIV and AIDS	

3 weeks prior to the training workshop

ACTIVITY	DETAILS	TICK
Arrange for copies to be made of Provincial-specific inclusions in the facilitator and participant manuals	· Provincial strategic and/or business plans	
	· Provincial registers and forms (if different from National forms) – including guidelines for completion if in existence	
	· Provincial data flow policies and time-lines (keep in mind that National policy requires data to flow through Information Officers – the same as for routine PHC and Hospital data)	

2 weeks prior to the training workshop

ACTIVITY	DETAILS	TICK
Confirm workshop arrangements with Province and venue		
Confirm own travel and accommodation arrangements		
Get all workshop materials ready	· Attendance register	
	· Daily evaluation questionnaire (4 copies per participant)	
	· Workshop evaluation forms	
	· Pre- and post-test assessment forms (write a unique number on each and ask participants to write these numbers on first page of the participants manual) Two copies per participant.	
	· Answer sheets for activities	
	· News print	
	· Prepare flipcharts as needed	
	· Prepare talking cards (cut coloured papers to size) etc.	
	· Name tags	
	· Masking tape	
· Permanent markers (do not use smaller than Artline90)		

1 week prior to the training workshop

ACTIVITY	DETAILS	TICK
Obtain manuals for your workshop		
Add provincial specific and other material to the back of the manuals	· Monitoring and Evaluation Framework for the Comprehensive HIV and AIDS Care, Management and Treatment Programme for South Africa	
	· National ART Treatment Guidelines	
	· Provincial patient registers, forms and guidelines for completion (as applicable)	
	· Provincial HIV and AIDS strategic / business plans	
	· Provincial policies, procedures, guidelines as applicable	
Liaise with your co-facilitator	· Divide various sessions (who will do what)	
	· Discuss roles of each facilitator during the training (writing on flipchart during brainstorming sessions, pasting flipcharts to wall, assisting in support to groups during workgroup sessions, note-taking, etc.)	
Start your own preparation on the facilitators manual	· Practice use of PowerPoint slides, timing, etc	

1 day prior to the training workshop

ACTIVITY	DETAILS	TICK
Travel to the province	· Take all materials	
	· Visit the training venue and ensure that everything is in place – check the layout of the room and make changes if needed.	
	· Set up a registration table at the entrance to the room	
	· Fold coloured A4 paper in half (length-wise) and place alternative colours (4) at seats for participants to write their names on it. This also helps with allocation of groups as all the 'yellows, pinks' etc will be in one group	
	· Check the data projector and make sure that it works with your notebook	
	· Check power outlets, extension cords, double adapters etc.	
	· Unpack all training materials on a separate table	

On Day 1 of the training workshop

ACTIVITY	DETAILS	TICK
Arrive at venue – 1 hour before workshop is schedule to commence	<ul style="list-style-type: none"> · Set-up the registration table with name tags, permanent markers, attendance register and pens (one facilitator to remain at the table to welcome participants and to ensure that they complete the attendance register and receive name tags) 	
	<ul style="list-style-type: none"> · Set-up data projector and Notebook – open all PowerPoint presentations to be used for the day and keep them minimised at the bottom of the screen for easy access 	
	<ul style="list-style-type: none"> · Start the workshop on time! 	

Every day of the training workshop

ACTIVITY	DETAILS	TICK
Arrive at venue at least half an hour before commencement	<ul style="list-style-type: none"> · Ensure that attendance register is completed as participants arrive 	
	<ul style="list-style-type: none"> · Set-up data projector and Notebook – open all PowerPoint presentations to be used for the day and keep them minimised at the bottom of the screen for easy access 	
	<ul style="list-style-type: none"> · Start the workshop on time! 	

COURSE TIMETABLE

DAY 1

SESSION 1: Welcome and introduction		1 hour 50 minutes
Time	Activity	Teaching method
5 min	1. Welcome	facilitator presentation
30 min	2. Introductions	plenary discussion
15 min	3. Expectations	plenary discussion
15 min	4. Ground rules and housekeeping	plenary discussion
30 min	5. Pre-assessment questionnaire	individual work
15 min	6. Overview of project phases and training course	facilitator presentation

SESSION 2: HIV and AIDS		1 hour 40 minutes
30 min	1. Ice breaker: HIV transmission game	group work
10 min	2. HIV transmission	facilitator presentation
20 min	3. The context of the HIV and AIDS epidemic	facilitator presentation
40 min	4. HIV infection progression	group work facilitator presentation

SESSION 3: Confidentiality		45 minutes
15 min	1. The meaning of confidentiality	plenary discussion
10 min	2. Legal and ethical aspects of confidentiality	facilitator presentation
20 min	3. Ensuring confidentiality	plenary

SESSION 4: The Comprehensive Plan and National ART Treatment Guidelines		1 hour 30 minutes
20 min	1. The principles of planning and the planning cycle	plenary discussion facilitator presentation
20 min	2. Introducing the Comprehensive Plan	facilitator presentation
50 min	3. Examining the components of the Comprehensive Plan	group work

DAY 2

SESSION 4: The Comprehensive Plan and National ART Treatment Guidelines (cont)		1 hour 45 minutes
15 min	1. Starting the day	plenary discussion facilitator presentation
20 min	2. Progress with implementation of the Comprehensive Plan	facilitator presentation plenary discussion
20 min	3. Challenges of the Comprehensive Plan	facilitator presentation plenary discussion
20 min	4. Staging and ART eligibility criteria	facilitator presentation plenary discussion
30 min	5. Understanding antiretroviral therapy	facilitator presentation

SESSION 5: Introduction to monitoring and evaluation		3 hours
30 min	1. Defining monitoring, evaluation and indicators	group work facilitator presentation
30 min	2. Establishing the links: the planning cycle, M&E and the information cycle	facilitator presentation
30 min	3. Classifying indicators in the M&E Framework	group work
30 min	4. Defining key terms and calculating indicators	facilitator presentation
60 min	5. Calculating indicators	group work

DAY 3

SESSION 6: Indicator sets and data element sets		1 hour 45 minutes
15 min	1. Introduction to the day	plenary discussion facilitator presentation
10 min	2. The minimum indicator set concept	facilitator presentation
15 min	3. Selecting indicators	plenary discussion
20 min	4. Indicators and datasets	facilitator presentation
45 min	5. Assessing datasets	group work

SESSION 7: Data collection		2 hours
40 min	1. Assessing where data is collected	group work
20 min	2. Introduction to data collection tool	facilitator presentation
30 min	3. Exploring data collection tools	group work
10 min	4. Data flow policies and procedures	facilitator presentation
20 min	5. Exploring data flow procedures	group work

SESSION 8: Processing data: quality and analysis		2 hours
20 min	1. Identifying data quality problems	plenary discussion
10 min	2. What is good quality data?	facilitator presentation
40 min	3. Assessing data quality	group work
5 min	4. Improving data quality	facilitator presentation
45 min	5. Analysing data	group work

DAY 4

SESSION 9: Presenting information		2 hours
10 min	1. Introduction to the day	plenary discussion
30 min	2. Review indicator calculations	plenary discussion
10 min	3. Presenting information	facilitator presentation
50 min	4. Drawing graphs	group work
20 min	5. Assessing feedback mechanisms	plenary discussion

SESSION 10: Interpreting and using information		2 hours
15 min	1. Approaches to interpreting information	facilitator presentation
45 min	2. Interpreting information	group work
30 min	3. Course evaluation	individual work
10 min	4. Follow-up support and evaluation	facilitator presentation
20 min	5. Course wrap-up	plenary discussion