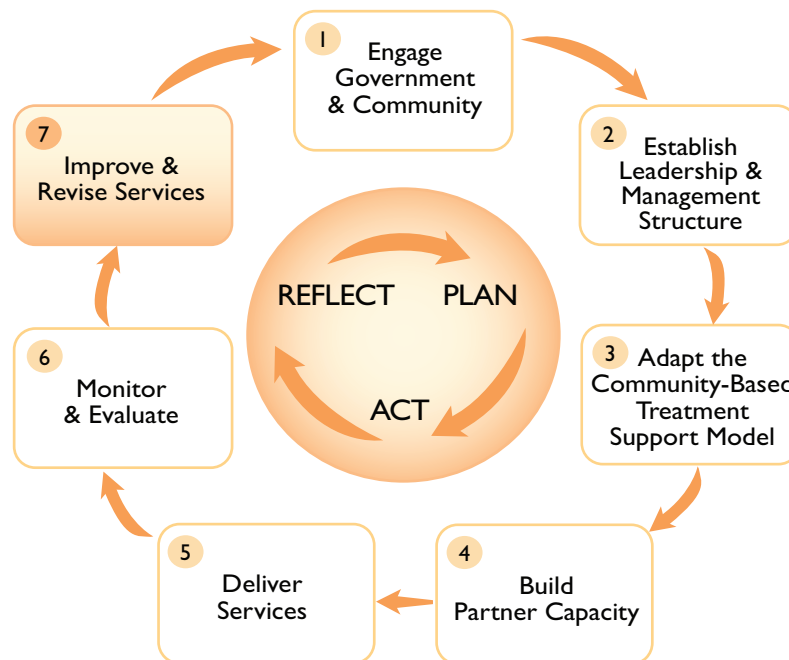


Step 7: Improve and Revise Services



It is important to reflect on successes, challenges, risks and current and future needs and then prepare what needs to be done next. This can be achieved through reviewing plans, processes and actions against their goals and objectives. The major input for this step is the monitoring and evaluation data as well as additional assessments. This step should also be seen as an opportunity to report back to stakeholders and get their input and assessment on the way forward.

- Assessments can be conducted to determine the impact programmes have had on patients, their families and their communities. For an HIV CBTS programme, these could include a facility assessment and patient satisfaction survey, a community household assessment and qualitative surveys of PLWHA. The STF programme employed all of these plus a rigorous study of the added value of community services for a group of patients receiving ARVs. This was measured by patient adherence to medication, quality of life, clinical improvement and decrease in stigma and discrimination. **Resource No. 14** contains a set of relevant questionnaires and assessments:
 1. Quality of life Impact questionnaire
 2. Adherence questionnaire
 3. Household Assessment questionnaire
 4. Health related Quality of Life questionnaire
 5. Indepth interviews with patients living openly with HIV/AIDS
 6. Overview of the enhanced patients evaluation, and
 7. Stigma and Discrimination questionnaire.

Objectives

- Review monitoring data and document successes
- Conduct programme and specialized evaluations
- Identify problem areas and assign parties and resources to address the problem areas
- Reflect and revise your plan at three levels
- Celebrate successes and harness motivating actions
- Disseminate findings

Expected outcomes

- Active use of M&E data to identify problems and address them throughout the programme timeline
- Success and lessons identified and disseminated
- A revised business case and programme that are relevant to the needs of the next period

Review Monitoring Data

More than just tracking what is being done, monitoring data is an early warning sign of things that are not going as planned. Such data can also be a great motivator for the team, if all targets are met or exceeded.

Therefore, in reflecting about the programme, monthly, quarterly, semi-annual and annual monitoring data should be used when it is still current. Also, track new resources and policies that can support the project.

As stated in Step 6, monitoring is a management tool; it validates advocacy initiatives, ensures accountability and also helps to build the business case.

Conduct Programme and Specialized Evaluations

Unlike monitoring, programme evaluation occurs at specific times and aims to build a Big Picture of the programme's progress at a specific point in time. Evaluation reports should be seen as opportunities to improve services and intervention. Therefore, these reports should be timed well and welcomed.

Complex evaluations conducted to determine the impact of programmes should always be planned for to answer unforeseen questions.

Questions to ask at this step are the following:

- Was the CBTS programme vision achieved and is it still relevant?
- Could the CBTS implementation have been done better and is it still relevant?
- Are the partners still relevant or are new partners needed?
- Are there new needs for the patients served?

Revise Plan at Three Levels

There are three levels of reflecting and reviewing services.

Level 1: Monthly revisions are limited to tactical teams and action plans. These revisions do not result in major service revisions, and they are done at the implementation level by service providers and technical teams. They are about paying more attention to raw monitoring data and field experience, which indicates tasks that are lagging behind or are more challenging.

Level 2: Quarterly or semi-annual revisions are about objectives and targets. Reviews and reflection involve broader technical teams and management teams and respond to process and output indicators. The major informants for this level are:

- Baseline reports
- Quarterly and semi-annual cumulative monitoring data and trends
- Responses from donors and governments on submitted reports

If objectives are not achieved and targets are not met, the affected service should have a thorough review or even be subjected to operational research. This may result in revised targets, improved processes or reallocation of resources.

Level 3: Annual or mid-point and end of programme revisions are about strategy and processes employed by the programme. The reflection focuses on reviewing progress against the vision and goals of the programme by all programme governance, management and beneficiary structures. Time should be invested in preparation and deliberations, which can be over two or three days. The purpose is to reflect on goals, strategy, processes, priorities and allocation of resources and how to serve future needs. **Tool No. 24** is a tool to help facilitate such a reflection process.

Celebrate Successes and Harness Motivating Actions

It is also important to highlight what has been done well and to celebrate successes.

During the annual review it is important not to dwell on challenges and what could have been done better. This is also the time to document best practices that can be incorporated when services are being revised. It is also important to capture activities, processes and experiences that energized and motivated individuals and teams.

The simple way is to ask each individual or team to record their most rewarding experience or most exciting time during the programme.

Disseminate Findings

The first people entitled to the monitoring and evaluation findings, reflection report and revised service plan are the programme teams, from implementers to steering committee members.

All programmes, but especially projects initiated as pilots, should document their processes, outcomes and lessons because this will be important when they report back to government and funders and want to advocate for their model to be scaled up or replicated.

A plan to disseminate programme outcomes at key milestones and at the end of the project should also be developed early on during the programme life cycle as dissemination always has budget implications.

Lessons Learned

- Use monitoring and evaluation data to help with critical reflection at different levels throughout the programme life cycle.
- Do not wait for formal evaluations to reflect and improve your activities. Each team member should do so on a monthly basis, each project on a quarterly or semi-annual basis and the whole programme annually, at mid-point and at the end of the programme.
- It is important to celebrate successes, and monitoring data and reports are a good way to show that the programme and the team are moving in the right direction.

Tool for this step

- Tool No. 24 Reflection Tool

Resource for this step

- Resource No. 14 Questionnaires for specialized monitoring and evaluation: Sample clinical and QOL impact questionnaire