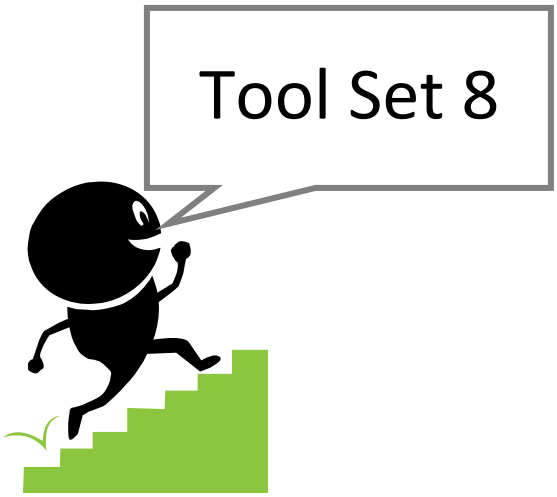

TOOL SET 8: MONITORING AND EVALUATION PLANNING TOOLS

The tools contained in this tool set are designed to support program implementation planners in thinking through necessary changes to monitoring and evaluation (M&E) tools as a result of the revised WHO guidelines and to keep track of these changes in the process of implementing the revised WHO guidelines.

SECTION CONTENTS

- 8.1. Tool to Outline Key Changes in Registers
- 8.2 Documentation of Changes in M&E Tools

8.1 CHECKLIST FOR M&E TOOLS THAT NEED TO BE CHANGED BASED ON REVISED GUIDELINES

PURPOSE

The checklist aims to help countries think through considerations for M&E tools that need to change based on the revision of the WHO guidelines.

POTENTIAL USES FOR THIS TOOL

The tool provides a framework for identifying all data collection tools that need to be revised based on the updated WHO guidelines. At the national level, this checklist can be used to identify existing national M&E tools needing modification. At the site level, this checklist can be used assess whether a site has appropriate M&E tools for implementation of the new guidelines.

INSTRUCTIONS

This checklist is divided into four different sections corresponding to the four WHO guideline technical areas. Each section is separated into two columns. The left-hand column of each section lists the M&E tools that need to be adapted to the revised WHO guidelines. The right-hand column presents two questions: (1) “Has the tool been revised at the national level?” and (2) “Has the revised tool been received by the site?” If sites have not received existing revised data collection tools, follow up as appropriate to ensure that sites receive these materials.

1. At the national level, program managers and technical staff should answer the first question

2. At the site level, district program officers, data officers/clerks and any other relevant district/site-level staff should answer the second question.

8.1 CHECKLIST FOR M&E TOOLS THAT NEED TO CHANGE BASED ON REVISED GUIDELINES

ARVs for PMTCT	**Has the tool been revised at the national level?**		**Has the revised tool been received by the site?**	
Tool	**Yes**	**No**	**Yes**	**No**
ANC Register				
L&D Register				
PNC Register				
WCC Register				
HIV-Exposed Infant Register				
Monthly Reporting Forms				
District/Provincial Reporting Forms				
Donor-Specific Forms				
SOPs				
Data-Use Plans				
Community Level Monitoring Tools				
Other				

Infant Feeding	**Has the tool been revised at the national level?**		**Has the revised tool been received by the site?**	
Tool	Yes	No	Yes	No
PNC Register				
L&D Register				
WCC Register				
HIV-Exposed Infant Register				
Monthly Reporting Forms				
District/Provincial Reporting Forms				
Donor-Specific Forms				
SOPs				
Data-Use Plans				
Community Level Monitoring Tools				
Other				

Adult Treatment	**Has the tool been revised at the national level?**		**Has the revised tool been received by the site?**	
Tool	**Yes**	**No**	**Yes**	**No**
C&T Database/Register				
Pre-ART Registers				
ART Registers				
Pharmacy Records				
Lab Registers				
Monthly Reporting Forms				
District/Provincial Reporting Forms				
Donor-Specific Forms				
SOPs				
Data-Use Plans				
Community Level Monitoring Tools				
Other				

Pediatric Treatment	**Has the tool been revised at the national level?**		**Has the revised tool been received by the site?**	
Tool	**Yes**	**No**	**Yes**	**No**
C&T Database/Register				
Pre-ART Registers				
ART Registers				
Pharmacy Registers				
Lab Registers				
Monthly Reporting Forms				
District/Provincial Reporting Forms				
Donor-Specific Forms				
SOPs				
Data-Use Plans				
Community Level Monitoring Tools				
Other				

8.2 DOCUMENTATION OF CHANGES IN M&E TOOLS

PURPOSE

This tool can be used by district program officers and technical staff to keep track of changes that have been made to M&E tools in the process of implementing the revised WHO guidelines.

POTENTIAL USES FOR THIS TOOL

This tool tracks which data collection tools have been revised and also helps to determine which changes have been made prior to the implementation of the new guidelines and which changes have been made after implementation of the guidelines.

INSTRUCTIONS

The checklist is divided into four different sections according to the four technical areas addressed by the WHO guidelines.

1. Fill in the name of the M&E tool under the “tool name” column.

2. Fill in the changes that have been made before the implementation of the guideline revisions under the “before” column for that specific tool.

3. Fill in the changes that been made after the implementation of the guideline revisions under the “after” column for that specific tool.

4. Use this information to evaluate progress in changes to M&E tools and determine further changes

8.2 DOCUMENTATION OF CHANGES IN M&E TOOLS

ARVs for PMTCT		
Tool Name	**Changes Made**	
	Before	After

Infant Feeding		
Tool Name	**Changes Made**	
	Before	After

Adult HIV Treatment		
Tool Name	**Changes Made**	
	Before	After

Pediatric HIV Treatment		
Tool Name	**Changes Made**	
	Before	After