**Avian and Pandemic Influenza M&E Training Toolkit**

**Introduction:**

Developing monitoring and evaluation (M&E) systems for emerging infectious diseases, such as avian and pandemic influenzas, can be a significant challenge. The constantly changing nature of these diseases often hampers effective strategic planning and program development. However, early establishment of API M&E systems provides programs with standard approaches to monitor progress at global, regional, national and sub-national levels. API programs require M&E training and tools that recognize the unique position of these programs in bringing together animal, environmental and human health concerns under one programmatic framework (“one world, one health”).

The Avian and Pandemic Influenza M&E Training Toolkit aims to increase the M&E capacity, skills and knowledge of those who plan, implement, and evaluate avian and pandemic influenza programs at regional, national and sub-national levels. Countries vary widely in the experiences with the disease and their abilities to harness existing public health and veterinary infrastructures to prevent and control outbreaks. The Training Sessions and Toolkit provide managers, technical specialists, and M&E staff with user-friendly, modifiable training components to adapt for a specific country and programmatic contexts. This comprehensive training aims to increase capacity to conduct effective M&E from program inception to indicator selection through effective use of M&E data. The tools also promote M&E efforts that highlight the integrated nature of these programs and the unique contributions they make to our understanding of one world, one health.

Although “API” is used through the Training Sessions and Toolkit components, the materials convey fundamental M&E concepts that are applicable as programs evolve to address emerging infectious diseases more broadly. Given the multi-faceted and ever-changing nature of these programs, no single M&E training can fill all knowledge and practice gaps. To respond to the diverse needs of this audience, the Training Sessions and Toolkit materials are modular and readily adaptable – each individual organization or user is encouraged to refine the training materials to suit their specific training and organizational needs. Although the Training Sessions and Toolkit are intended for a facilitator to train others in M&E, the course could also serve as a self-taught course on conducting M&E for API programs. Facilitators and users are encouraged to make changes that reflect their programmatic context, country focus, audience, and sector-specific reporting needs. The complete seven-Session course could be covered in as little as one week or specific Sessions or activities could be offered over days or weeks. Choosing the Sessions to implement, the specific activities to conduct, and the training schedule is left to each user. Additional M&E resources and background information are included as references.

The Training Sessions and Toolkit complement more comprehensive MEASURE Evaluation training materials by providing specific guidance on how to tailor existing tools for API programs. Comprehensive MEASURE Evaluation M&E training materials for public health programs (MCH, FP, HIV) as well as additional course materials may be found here: <http://www.cpc.unc.edu/measure/training/mentor>

The Avian and Pandemic Influenza (API) M&E Training Toolkit and Training Sessions were funded by MEASURE Evaluation Phase III and were extensively revised based on the pilot use of the curriculum in a one-week training course for national and provincial officials in Lao P.D.R. in October 2009.

**Training Objectives:**

* To increase understanding of the basic concepts and practical approaches for performance monitoring and evaluation for avian and pandemic influenza (API) programs
* To gain hands-on experience in designing components of monitoring and evaluation plans for API programs
* To provide an understanding of key data quality issues and tools to resolve these issues

**Training Audience:**

The Training Sessions and Toolkit are written for regional, national and sub-national programs focused on API prevention and control. The monitoring and evaluation (M&E) knowledge and skills promoted in these materials is largely borrowed from the health and population sectors and applied to an integrated programming context to address the specific needs of programs that work across the spectrum of animal and human health.

The Training Sessions and Toolkit are most useful for:

* Members of national API coordinating committees
* National and sub-national level program managers and technical staff of API programs
* International partners and consultants responsible for planning and implementing M&E of API programs in collaboration with host-country institutions

**Training Sessions and Toolkit Components:**

The Training Sessions contain seven Sessions, for which PowerPoint slides with detailed speaker notes are provided. Each Session has practice activities included, as well. The Toolkit provides all the resources needed to conduct the course, including the activities, additional training materials, and additional M&E resources.

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| **Session** | **Topic** | **Key components** | **Slides/Materials** |
| 1 | Training overview | * Welcome and introductions * Training purpose and objectives * Training overview * Expectations, ground rules * SMALL GROUP ACTIVITY: Group Introductions | * PPT: Introduction to the workshop * Registration form * Curriculum |
| 2 | M&E Work Plan Overview | * Purpose of M&E work plan * Components of an M&E work plan * Introduction to work plan definitions * Introduction to work plan template * SMALL GROUP ACTIVITY: Program description, background, goals and objectives | * PPT: M&E Workplan * M&E workplan |
| 3 | Introduction to M&E | * Definitions of program components * Definitions of monitoring and evaluation * Comparing monitoring and evaluation * Logical Frameworks * SMALL GROUP ACTIVITY: Logical framework | * PPT: Introduction to M&E * Logical Framework with notes * Logical Framework - blank |
| 4 | Indicators | * Definition of an indicator * Levels of indicators * Linking indicators to logical frameworks * SMALL GROUP ACTIVITY: Definitions * Characteristics of good indicators * SMALL GROUP ACTIVITY: Strengths and Limitations of Indicators | * PPT: Introduction to Indicators |
| 5 | Selecting and operationalizing indicators | * Steps in selecting indicators * Common pitfalls in selecting indicators * Adding indicators to the program framework * SMALL GROUP ACTIVITY: Adding indicators to program framework * Operationalizing indicators * SMALL GROUP ACTIVITY: Operationalizing indicators | * PPT: Selecting and operationalizing indicators * Guide to Monitoring and Evaluating Avian Influenza Programs in Southeast Asia * Indicator selection activity handout\ * Indicator reference sheet |
| 6 | Data flow, data management and data quality | * Surveillance Project Example * Data Management: 6 Essential Steps * SMALL GROUP ACTIVITY: Data Flow and Use Table * Ensuring data quality at each step * SMALL GROUP ACTIVITY: Data Flow, Data Use and Data Quality | * PPT: Data flow, data management and data quality * Data flow and use table |
| 7 | Planning for Evaluation | * Key definitions: monitoring and evaluation * Process monitoring and process evaluation * Outcome monitoring and outcome evaluation * Impact monitoring and impact evaluation * Evaluation study designs * SMALL GROUP ACTIVITY: Evaluation Plan | * PPT: Planning for Evaluation * Evaluation plan template |

**How to use the Training Sessions and Toolkit:**

***Notes for the facilitator:***

All directions and comments for the facilitator are noted in ALL CAPS and enclosed in [brackets] throughout the materials. These include issues for further reading, ideas on adaptation, suggested review materials, and notes about leading discussions, activities, or presentations. Comments for the facilitator to read to participants are written in sentence case without brackets.

***Training Session components:***

Each training Session, other than the introduction, has the same layout. The Session title slide lists any resources or materials that will be needed for the Session including copies of specific tools or activity preparation. The Sessions begin with a brief overview, providing participants with an understanding of the flow of the session and the major components to be covered. The overview slide provides introductory comments for the facilitator. The overview is followed by a slide on Session learning objectives that describe what participants will learn in the Session, including the expectations for knowledge or skills to demonstrate by the end of the session. Subsequent slides present the technical content of the Session. Slides and facilitator notes frequently include discussion questions to encourage participation and active engagement. Large group discussions, partner activities, and small group work is incorporated throughout the training, and small group activity slides are colored green. Although an approximate amount of time is suggested for every activity, the facilitator will have to adjust the activity timing to meet the needs of participants.

Group work

A small group project is incorporated throughout the training course to facilitate the transition from knowledge to practice. Participants should come prepared to work on a specific API program in groups of 4-6. Participants who complete the activities included throughout the training will gain experience:

* Developing project goals and objectives (Session 2)
* Designing logical framework (Session 3)
* Identifying appropriate indicators (Session 5)
* Selecting appropriate indicators (Session 5)
* Managing data flow and use (Session 6)
* Planning for evaluation (Session 7)

As a result, at the end of all the training, each group will be able produce the key elements of an M&E plan, including the indicators, a plan to gather the information, and who needs/wants the data. The training products can be based on a program that participants bring to the workshop or on an example API program, such as the national API program. Throughout the course, each group will present the components and receive feedback from other participants and the facilitator.

**Toolkit Materials**

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|  | **Training material name** | **Session** |
| **Training Toolkit Components** | |  |
|  | Introduction to API M&E Toolkit |  |
|  | Training Sessions |  |
|  | Facilitator notes |  |
|  | A Guide for Monitoring and Evaluating Avian Influenza Programs in Southeast Asia – CD |  |
| **Handouts** | |  |
|  | M&E Work Plan Template | 2 |
|  | Logical Framework (with notes) | 3 |
|  | Logical Framework (blank) | 3 |
|  | Indicator Reference Sheet | 5 |
|  | Indicator Selection Activity Handout | 5 |
|  | Data Flow and Use Template | 6 |
|  | Evaluation Plan Template | 7 |
| **Supplemental Material** | |  |
|  | Curriculum |  |
|  | Sample agenda |  |
|  | Daily monitoring form – example |  |

Training preparation for a facilitator:

If you are leading this course as a facilitator, preparing months or weeks in advance is advantageous for the successful implementation of these M&E training Sessions. These are some of the tasks and issues you should consider before implementing this training:

1. Read through the entire set of Training Sessions PowerPoint slides to become familiar with the included Sessions, their components, and the practice activities that accompany the Sessions.
2. Carefully read through Toolkit materials, concentrating on the Training Activities and Additional Training Materials documents. Familiarize yourself with the included materials for the course
3. Determine the M&E training needs of the participants. What do they know? What do they want to learn? What skills do they have and what gaps do they wish to fill? What are their expectations for M&E knowledge or materials as a result of the course?
4. Determine the training timing. How many hours or days will they have? Will the course be mandatory or elective for the participants?
5. Assess your training skills. Are you the facilitator? Do you have people to co-facilitate with you? Do you feel comfortable and confident to modify the training materials to meet participant needs? Do you need to seek additional help to match the course materials to the audience? Are you comfortable presenting the materials to the selected audience?
6. Select the Training Sessions and Toolkit activities that best meet the M&E capacity needs of the intended participants.
7. Review the Training Sessions thoroughly, adapting them for the target audience, their skills level, or their M&E needs. Adaptations may include: changing the text of the facilitator text to match examples from your field program; adding in examples from your field program; determining effective groups for course projects; filling gaps in the training materials, and removing sections that do not fit your training needs.
8. Complete all of the Toolkit practice activities on your own, including partner and small group work. Make adjustments to the activities, if needed, to better fit the learning objectives of the participants. Review the instructions and revise as needed for clarity.
9. Prepare the training materials for participants. This includes enough copies of the following materials for all participants:

* All slides with room for notes
* Activity handouts
* CDs of additional materials if possible
* Pens/pencils
* Optional: name tags; attendance sheet; binders for participants; certificates of completion

1. Prepare the materials needed for group work including:

* Scratch paper
* Three markers per group
* Pens/pencils for all participants
* Butcher paper or other large paper/posterboard
* Blackboard or other large writing surface
* Tape or easels with clips for presenting group work
* Flip charts

1. Prepare the training room

* LCD projector and screen (with laptop)
* Extension cords
* Sufficient outlets
* Desk/workspace for all participants
* Break-out rooms for group work

1. Prepare and send materials to participants in advance of the course

* Before attending, all participants should complete this free, online, two-hour course: <http://www.cpc.unc.edu/measure/training/mentor/me_fundamentals>
* Send out workshop logistics (for example, where the workshop is being held, where participants are staying)
* Expected time of the workshop

1. Practice running the training

* Meet with your co-facilitators (if applicable)
* Review course components and activities
* Practice the timing of slides and activities
* Prepare some backup plans if the Session is either too difficult or too easy – knowing which slides/components you might skip or activities you might add
* Confirm that supplies and copies are ready for the training so you can concentrate on facilitating a quality course