TEFT Case Study I: Rashinsa's Experience

Part I

Rashinsa is a well-respected monitoring and evaluation (M&E) officer for Health1, a local non-governmental organization (NGO).[1] For several years, Health1 has been implementing PEPFAR-funded capacity building activities as a subcontractor to Umbrellus, an international NGO that receives funding through the USAID country office. One of Health1's main activities is a program that provides in-service training for local doctors and nurses. The training is designed to teach them to use best practices to properly diagnose and treat sexually transmitted infections (STIs).

Health1 is proud of their strong M&E. Health1 has a formal M&E plan that details how they monitor the implementation of their training activities. Following the plan, Health1 counts the number of trainings held and the number of providers trained, and compares these to their annual workplan to gauge progress. They also report these numbers up to Umbrellus, who include that data in their reports to PEPFAR.

In addition, Health1 evaluates each of their trainings by conducting pre- and post-training knowledge assessments among the trainees. For nearly all the trainings they have evaluated, they have been able to show increased knowledge of proper STI diagnosis and correct treatment, as reported by trainees following the trainings. Because of this data, and because they have proven that they are able to deliver high quality trainings that adhere to the plans they develop with Umbrellus and PEPFAR, their programs are widely regarded as successful.

Recently, however, Rashinsa has been hearing more about "outcome" evaluations. During a PEPFAR implementing partners meeting she notices a great deal of discussion about the need for outcome-level data to assess the impact of PEPFAR programs. The emphasis on outcomes raises some questions for Rashinsa. What does this new emphasis mean for Health1's M&E plan? How might she modify their current training evaluations? Also, Rashinsa has always understood health outcomes to mean changes to overall health indicators at a large scale (in a country or large population), and she isn't

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[1] *Rashinsha and Health1 are fictional entities; any semblance to actual people or organizations is coincidental.*

sure how to evaluate those indicators practically, or to demonstrate how Health1's trainings might have that type of impact.

Later in the day, Rashinsa notices a link to the Training Evaluation Framework and Tools (TEFT) in her meeting training materials. The TEFT seems to anticipate at least some of her questions, so she decides to explore the program's online resources. Rashinsa's goal is to re-think Health1's evaluation of their training programs in terms of the PEPFAR emphasis on health outcomes.

After Rashinsa watches the "Get to Know the TEFT" introductory slides and becomes familiar with the Framework, she begins to think about different types of outcomes at the individual, health facility, and population level. The Framework helps her visualize these relationships more clearly.

She realizes that assessing "health outcomes" does not only mean examining outcomes at the larger population level. It can also include assessment of individual trainee level outcomes (for example, a patient correctly diagnosed and treated for an STI), or outcomes at the health facility level (for example, rates of correct STI diagnosis and treatment at a clinic where Health1 has trained providers). She begins to see that it would be much easier for Health1 to link its trainings to individual- and facility-level patient outcomes than to patient outcomes across the entire population.

Part II

When Rashinsa returns to her office a few days later, she spends a little more time with the TEFT.

From the website materials, she understands that the TEFT tools can be used together, as a series of six steps, to help her think about different factors as she develops her next evaluation.

Rashinsa decides to begin with Step 1. She prints out a copy of the Training Evaluation Framework Template. When she applies Health1's current evaluation efforts to the Framework, she realizes that conducting pre- and post-training knowledge assessments, one way to measure training success, does not necessarily indicate that increased knowledge is really being applied in the clinical setting, or that knowledge and its application are really changing health outcomes. In short, it doesn't answer the question "Are patients truly getting better care?"

She decides that the next practical step in evaluating the outcomes of the training program Health1 is implementing is to look at how trainees apply their knowledge and skills in the clinics where they work.

The Framework has helped her to focus on a clear chain of causation: if the trainings are creating positive change in individual patient health outcomes (and in turn, health outcomes in the larger community), that change will begin with how well the trainees are incorporating their new knowledge and skills into their clinical practice.

In this way, the Framework has helped Rashinsa clarify and become comfortable with the concept of outcome-focused evaluation. It has shown her some ways to adjust and apply Health1's strength in M&E to some new concepts. She sees now that there are options for evaluation that are more informative in terms of outcomes than Health1's current knowledge assessment evaluations. She also decides to look into other practical evaluation options open to her that will stay within the budget and operational capacity of her team.

Based on these new insights, Rashinsa begins planning ways to evaluate the effect that Health1's trainings are having on provider performance in the clinical setting. And, when she next meets with her colleagues at Health1 and Umbrellus, she can use these concepts to open meaningful discussion on evaluation goals, rationale, and planning.

In addition, Rashinsa may also decide to use the other TEFT tools to inform her planning. She might consider using the Situational Factors Worksheet to map out other factors (aside from Health1 trainings) that could be affecting outcomes. She might spend an hour or two with the Evaluation Considerations Tool, which can help her plan the right level at which to conduct her next evaluation. The TEFT also offers her the Outcome Evaluation Planning Template, the Questions and Indicators Template, and other resources.