Name of project: . . . .

Date: . . . .

Succeed

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Quality Improvement Tool
for HIV Prevention Projects

IQ hiv
Improving Quality
in HIV Prevention
in Europe

HIV Quality Action
Improving HIV Prevention in Europe

Succeed Quality Improvement Tool for HIV Prevention Projects

For HIV prevention projects, it may be difficult to know whether their work is proceeding in the right direction or not. What is needed is a simple method for checking that the work is of good quality. *Are the goals clear? Are the right populations being reached? Are there sufficient resources and expertise? Is the message getting across?*

The *Succeed* tool uses a straightforward questionnaire to capture critical data points about the quality of your project. Positive responses

to questions indicate a project has a reasonable structure and is being run in a way that should lead to good quality results. Negative answers tend to indicate the opposite, or at least point to shortcomings in planning and/or implementation. These are things that need to improve.

The *Succeed* tool addresses three widely recognised aspects of work on quality improvement: Structure, Process and Results.

➜ **Structure** covers how operations and resources are organised it has six subsections: 1) Goals, 2) Key Population(s), 3) Approach, 4) Responsibility, 5) Organisation and 6) Resources.

➜ **Process** refers to the activities carried out in the project; it has three subsections: 1) Support and Participation, 2) Networks and 3) Reach & Response.

➜ **Results** are outcomes that can be counted or concretely described and identified; it has three subsections: 1) Measuring Effects, 2) Environmental, Operational & Social Changes and 3) Sustainability.

Succeed is based on a scientifically published tool for Quality Improvement and Quality Assurance in health promotion generally.[1] If you want more background knowledge or guidance on how to use Succeed, go to www.qualityaction.eu

Who can use the Tool?

The *Succeed* tool is designed primarily for organisations implementing HIV health promotion and prevention projects . Although based on research, it uses a transparent and simple methodology that is equally useful for large and small organisations implementing large or small projects. It can also be used for projects run by health authorities, local communities, NGOs, CBOs, schools, etc.

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1   Berensson, K., Granath, M. and Urwitz, V. (1996) Succeeding with Health Promotion Projects – Quality Assurance. Landst– ingsförbundet (The Association of County Councils), Stockholm. Currently only available in Swedish in a revised version from 2012 at www.skl.se.

How can the Tool be used?

It is not necessary to answer all the questions, you can exclude those that do not apply. However, you should understand and be able to explain why you excluded them. However, the more questions you answer, the better the picture you will have of opportunities to improve the quality of your project.

The questions can be answered with varying degrees of thoroughness. Larger projects may require more detailed answers; you may want to collect information for the answers using more structured and/or extensive investigations, measurements, surveys, etc. Smaller projects are encouraged to provide detailed answers too, but that may not be necessary or possible given their scope.

For all projects, a 'no' answer to a question generally means there is an opportunity to take corrective action. However, the project team will have to decide if the action would be meaningful and reasonable in relation to the work and resources required.

Succeed works well in team or group workshops. If the organisation and the participants have limited experience with quality improvement, it is useful to appoint an independent person to facilitate a discussion about the responses to the questionnaire. Succeed allows a participatory approach, where several people (e.g. different members of the project team, individuals reached by the project, other stakeholders) discuss and respond to the questionnaire to compare their perspectives.

Always keep in mind that this is a self-assessment approach to quality improvement. It is therefore critical that you are open and honest when responding to the questions. Otherwise it will be difficult – if not impossible – to identify where and how you can improve your project.

Supplementary Materials

To help you use the *Succeed* tool, a set of supplementary materials is available:

➜ **Case studies: The MMSM project, The Saphy project, The PWID project**. Before using *Succeed*, it helps to read at least two of these examples. They will help you understand how questions can be answered in different ways and with different levels of ambition.

➜ **How to use *Succeed***. This is a guide to planning, using and following up results of the *Succeed* activity and should be used by anyone who has these responsibilities.

➜ ***Succeed* – concepts and theoretical background**. This is a paper based on the research supporting *Succeed*. It is written for facilitators and others who are interested in the concepts, knowledge and methodology underpinning *Succeed*.

GOALS

A solid understanding of the issues you want to address with the project is an essential part of setting goals. And clear and concise goals are an important way to help everyone involved in the project work in the same direction.

If you answer 'no' to any of the following questions, think about what needs to be done in the project in order to answer 'yes' to the question. In fact, if you answer 'no' to any question in the Succeed tool, think about what needs to be done to ensure you can answer 'yes' to the question.

Have you set overall goals for the project?

Yes   **No**

If yes, what are they?

What do you want to achieve with the project?

Have you developed objectives or sub-goals for the project?

Yes   **No**

If yes, what are they?

Are the goals clear and concise enough for you to measure the project's performance? Think about what could be measured!

Yes   **No**

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward. (These three questions are a key part of the Succeed tool and they are integrated into each of the topic areas covered by the tool.)

What actions do you need to take to strengthen the goals of your project?

Who will take them?

When will they take them?

KEY POPULATION(S)

A good project knows a lot about the people it serves, including who they are and why they want and/or need what the project provides. Sometimes the project targets an intermediary group for the ultimate benefit of its key population (e.g. social workers who have contact with migrants). If so, please describe the link between your direct target group and the key population(s).

If you answer 'no' to any of the following questions, think about what needs to be done in the project in order to answer 'yes' to the question.

What key population(s) does the project reach or aim to reach?

Do/did you have specific reasons for selecting this group or groups?

Yes   No

If yes, what are/were your reasons for selecting this group or groups?

Did you use any data or other information to make your selection?

Yes   **No**

If yes, please provide a brief description of the data you used.

Are you reaching or planning to reach this key population directly with your project?

Yes   **No**

If no, who are you targeting as intermediaries and why?

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your knowledge of the key population(s) and other possible target groups?

Who will take them?

When will they take them?

APPROACH

To successfully implement a project, it is important to think through exactly what you are going to do beforehand. The approach (model) describes how the different components of a project are intended to work, what measures and activities are planned for the different components as well as how they are linked to each other.

Is there an overall outline or plan for your approach – a model that you want to apply and defined methods that you want to use?

Yes   **No**

If yes, please describe briefly!

Have you documented the different components of the approach?

Yes   **No**

Can you identify the strengths and weaknesses of the approach?

Yes   **No**

If yes, what are they?

Does the approach include any plans for regular quality management?

Yes   No

If yes, how – and how often – will you assess the quality of the project?

What will you do with the findings of quality management activities?

Have you discussed the ethical implications of the project?

Yes   No

   - Did you have any ethical concerns about the project?

   Yes   No

If yes, what are they?

Can you state the the project does not have unintended negative effects for anyone

Yes   No

If no, what are the unintended negative effects, and for who are they negative?

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your approach?

Who will take them?

When will they take them?

RESPONSIBILITY

Experience has shown that it is very important for a project to have the support of stakeholders and for lines of responsibility to be clearly drawn.

Don't forget, if you answer 'no' to any of the following questions, think about what needs to be done in order for the project to answer 'yes' to the question.

Who decided to initiate the project?

Does the project have the necessary backing from key stakeholders and decision makers?

Yes   **No**

If yes, how?

Is the division of responsibilities clear between the project management team and others in the decision making hierarchy?

Yes   **No**

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your approach?

Who will take them?

When will they take them?

ORGANISATION

Effective projects have well-defined organisational structures staffed with people who know their responsibilities and have sufficient time to do their work.

Is this project run as a 'stand-alone' project with its own staff or is it run by a 'parent organisation' as one of several activities?

Stand–alone project   Parent organisation

- If it is run by a parent organisation, is the project clearly delineated from its other activities?

Yes   No

Have you made decisions about the organisational structure of the project?

Yes   No

Have you selected a project manager?

Yes   No

Does the project manager have a clear and complete understanding of his/her authority and areas of responsibility?

Yes   No

Are all of the other people involved in the project clear about their roles and responsibilities?

Yes   No

Is there a realistic time plan for the project?

Yes   No

Have you set aside a realistic amount of time for everyone involved to complete their tasks?

Yes   No

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your approach?

Who will take them?

When will they take them?

RESOURCES

It is impossible to underestimate the importance of adequate resources and the ability to use those resources where they are most effective. The value of ongoing investment in personnel, including volunteers, is an equally important resource issue.

If you answer 'no' to any of the following questions, think about what needs to be done in order for the project to answer 'yes' to the question.

Do you have sufficient financial resources to do the work of the project?

Yes   **No**

If no, what are the specific components of the project that are under-funded?

Do you have enough people (paid workers and volunteers) to do the work?

Yes   **No**

If no, for which parts of the work would you need more people?

Do you have adequate facilities to do the work?

Yes   **No**

If no, what additional facilities do you need?

Do the project personnel have a role in determining how project resources are allocated?

Yes   **No**

If yes, can they re-allocate resources to adapt to changing needs and/or circumstances?

Do paid workers and volunteers have sufficient knowledge about the work of the project to be effective?

Yes   **No**

Is training available for paid workers and volunteers?

Yes   **No**

Have you set aside funds in the budget for future training needs?

Yes   **No**

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your approach?

Who will take them?

When will they take them?

CONGRATULATIONS! YOU HAVE COMPLETED THE FIRST PART OF *Succeed*.

Please move on to the second part.

SUPPORT AND PARTICIPATION

A "stakeholder" is an organisation, or a person or a group of people with an interest in or concern for the project. Stakeholders can, for example, fund a project, help implement parts of the project or be organisations representing a target population or professionals affected by the project. The support and participation of key stakeholders is vital to the successful implementation of a project. Their engagement can also help prevent and/or address opposition to the work of the project.

List the key project stakeholders (e.g. organisations and individuals) and identify their roles in the project (e.g. advisory, funding, planning, implementation, advocacy, assessment).

Does each of the stakeholders understand and agree with the goals of the project?

Yes   No

If no, who does not agree and why not?

Do all the key stakeholders have an opportunity to participate in:

- the planning of the project?   Yes   No

- the implementation of the project?   Yes   No

- the monitoring of the project?   Yes   No

Do you know if stakeholders feel that they are active participants in the project?

Yes   No

Does the project track the extent of stakeholder participation?

Yes   No

If yes, briefly describe how this is tracked.

Have stakeholders made formal commitments about their participation in the project?

Yes   No

If yes, can you list the commitments made by the various stakeholders?

Yes   No

Are there contracts or agreements between the project funder and the stakeholders (e.g. between the project funder and an implementing partner)?

Yes   No

If yes, briefly describe one example.

Is there a minimum level of participation required for stakeholders to stay involved in the project?

Yes   No

If yes, briefly describe one example.

Are there any economic relationships between the project and key stakeholders? Does the project receive or distribute funds to stakeholders?

Yes   No

If yes, please describe briefly:

- Are there clear agreements on how economic relationships should work?

Yes   No

Are stakeholders generally well informed about the project?

Don´t know   Few/ some   Most/All

Are there regular mechanisms for communicating with stakeholders?

Yes   **No**

If yes, what are the mechanisms (newsletter, meetings, annual report etc.)?

Has the project analysed potential obstacles and/or opponents to its work? Obstacles can be structural or general within the surrounding society, organisational or there can be important groups or individuals who oppose the work.

Yes   **No**

If yes, how has this analysis been factored into your planning:

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve the support and participation?

Who will take them?

When will they take them?

Networks

Many groups and persons beside the key stakeholders can be of importance for the project, especially for implementation. For instance, the director of disease control may be named as the stakeholder but her staff can also play an important role in the activities of the project, e.g. as a network of health educators. Networks can be particularly useful in communicating with stakeholders and as intermediaries that communicate with key populations. They can be grouped into categories according to their relationship with and role in the project. In Succeed, such groups are called 'networks' because they need not be formal groups...

Does the project have network(s)?

Yes   No

If yes, do you have a list of all organisations/groups in the network(s)?

Yes   No

If yes, does the list include detailed contact information for each organisation? (e.g. address, phone numbers, emails)

Yes   No

Do you have a list of all relevant individuals in the network(s)?

Yes   No

If yes, does the list include detailed contact information for each individual? (e.g. address, phone number, email)

Yes   No

Are all important organisations/groups and individuals included in the network?

Yes   No

If no, who is missing that you would like to include?

Do the network(s) have the opportunity to assess their work on the project?

Yes   No

If yes, have any such assessments of the networks taken place or are any planned for the future?

Yes   No

Are there opportunities for network members to build their capacity to participate in the project?

Yes   **No**

Have you set aside resources in the project for training network members?

Yes   **No**

Does the project encourage and support 'enthusiasts' (i.e. committed and active advocates/supporters/volunteers) of the project?

Yes   **No**

If yes, describe briefly

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your work with the networks?

Who will take them?

When will they take them?

Reach and Response

Your project should know if its messages and actions are getting through to those who are the target of its work. Are these people seeing and/or hearing your messages and accessing prevention services? Are they reacting to them?

If you answer 'no' to any of the following questions, think about what needs to be done in order for the project to answer 'yes' to the question.

Can you measure whether the project is reaching the key population(s) that are the ultimate beneficiaries of the work?

Yes   No

If yes, how is this done?

If the project can measure whether its efforts are reaching key population(s), can you determine what percentage of the population(s) are being reached?

Yes   No

If yes, what is that percentage and how is it determined?

Can you determine how key population(s) respond(s) to your messages or measures? For example, do key populations understand the primary prevention message(s)?

Yes   No

If yes, what is the response?

If your project is designed to reach intermediary target groups, can you determine what percentage of these groups are being reached?

Yes   No

If yes, what is that percentage and how is it determined?

Can you determine how the intermediary target groups respond to your messages or measures ?

Yes   No

If yes, what is the response?

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve the reach and respons?

Who will take them?

When will they take them?

MEASURING EFFECTS

A solid understanding of the issues you want to address with the project is an essential part of setting goals. And clear and concise goals are an important way to help everyone involved in the project work in the same direction.

Does the project measure whether the knowledge, attitudes and/or behaviour of key population(s) have changed over time?

Yes   No

If yes, how do you measure these changes? (e.g. questionnaires, interviews, project records)?

Does the project measure whether the knowledge, attitudes and/or behaviour of intermediary target groups have changed over time?

Yes   No

If yes, how do you measure these changes?

Are the changes in knowledge, attitudes and/or behaviour among key population(s) and intermediary target groups in line with the project's goals?

Yes   No

If yes, what do the data show for each project goal? (e.g. more accurate knowledge of risk behaviours, decreased stigma and discrimination, better HIV testing behaviour, consistent and proper condom use, consistent use of clean injecting equipment, increased uptake of drug replacement therapy, frank discussions with partners about safe sexual practices)

If no, why not?

If no (i.e. if the project does not measure whether the knowledge, attitudes and/or behaviour have changed over time), why not? (e.g. limited capacity, limited resources)

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve how you measure environmental, operational or social changes and secondary effects of the project?

Who will take them?

When will they take them?

ENVIRONMENTAL, OPERATIONAL & SOCIAL CHANGES

Some projects have goals concerning policy and the health-promoting environment for key populations. A good project also has the potential to have an impact beyond its specific goals.

Don't forget, if you answer 'no' to any of the following questions, think about what needs to be done in order for the project to answer 'yes' to the question.

Does the project track the outcomes and/or impact of its work more broadly? (e.g. knowledge, acceptance, reduced stigma and discrimination, obstacles to the provision of services, availability of services, range of service options, legislation, availability of funding)

Yes   No

If yes, how do you track these changes? (e.g. surveys, special studies, national statistics)

Are the changes moving the project towards its goal?

Yes   No

If yes, what do the data show?
(e.g. reduced stigma, improved availability and/or access to services, increased financial support, legal changes)

If no, why not?

If the project does not track the broader outcomes and/or impact of its work, why not?
(e.g. limited capacity, limited resources)

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to Improve your follow up of environmental, operational and social changes as well as possible secondary or wider effects?

Who will take them?

When will they take them?

SUSTAINABILITY

If there is an ongoing need, your project should be taking steps to ensure its work or part of its work can be maintained.

Does the project have an end date?

Yes   **No**

If yes, is there a need for the project to continue beyond the end date?

Yes   **No**

Are the project activities sustainable in the long run?

Yes   **No**

Have you taken steps to ensure sustainability?

Yes   **No**

If yes, what are they?

If no, why not?

Improvements and Next Steps

If you think the project can improve what it is doing in this area, use the following questions to help you decide how best to move forward.

What actions do you need to take to improve your approach concerning sustainability?

Who will take them?

When will they take them?

<div style="background-color:#29c2d6;color:white;padding:10px;">YOU HAVE COMPLETED SUCCEED. WELL DONE! WE HOPE YOU FOUND IT REWARDING.</div>

Ensure that participants in the exercise have an opportunity to give their feedback on the session.

If time allows:

- *Summarise your most important findings.*
- *Outline how the findings will be documented and used in the future before you end the session.*