

HOW TO USE *Succeed*

INTRODUCTION AND SHORT GUIDE



Quality Action
Improving HIV Prevention in Europe



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INTRODUCTION

This document was written to support those who want to use, or facilitate the use of, *Succeed*. Although not everyone taking part in the *Succeed* activity needs to read this guide, it is highly recommended that the person leading or undertaking a QI activity using *Succeed* should read it before planning the activity.

Following this guide will help you to plan, implement and use the results of your QI activity.

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1 WHAT IS *Succeed*?

Succeed is a knowledge-based, self-guided tool that has been created to help health promotion and prevention projects working in HIV prevention and/or SRHR to manage their task in a complex environment.¹ Research and experience both tell us that very few projects of this type reach their goals easily; it often takes longer than expected. Plans have to be changed because of unanticipated events and there is rarely a clear roadmap to follow. Some questions and choices along the way have no obvious answers. New solutions have to be found and changes have to be made. *Succeed* recognises that prevention and health promotion projects are often sophisticated and highly complex. While overall goals are only reached in the long term, *Succeed* can help you ensure that your day-to-day work is of good quality and that progress is being made.

2 HOW CAN *Succeed* HELP YOUR PROJECT?

Succeed is a tool that consists of general questions about key success factors or indicators. If these questions are answered, important areas of the project will be highlighted and can be reviewed. The answers to the questions can then guide the project forward towards its goals.

When using *Succeed*, you conduct a systematic review that will:

- improve the quality of the project by highlighting **areas that could be improved**
- **provide opportunities for target groups and other stakeholders to participate in project development**; this will create the necessary platform for the work they have to do, changes that are needed and priorities that have to be chosen
- **highlight the progress and intermediate results** that have already been achieved; this will not only motivate participants but also **enable better documentation and reporting**.

¹ A knowledge-based tool is built on research and best practice and which has been evaluated. You can read more about these specific aspects of *Succeed* in the document/file called '*Succeed* – a knowledge-based tool for Quality Improvement' on www.Qualityaction.eu.

3 HOW DOES *Succeed* SHOW WHAT NEEDS IMPROVEMENT AND CHANGE?

The questions in the *Succeed* questionnaire have been constructed in a specific way.

Positive responses to questions, answers like 'Yes' or 'We have X' or 'We have done Y', indicate that a project has a reasonable structure and is being run with good quality in that specific area of work. This will contribute to the desired outcomes.

Negative responses to questions, answers like 'No' or 'We have not done X' or 'We do not have Y', point to the opposite, or at least to deficiencies in planning or implementation of the project. There might be a need for improvement. The people involved then need to think about whether it is important, meaningful and cost-effective to take measures to improve the specific area highlighted. After each indicator, the questionnaire contains a space to consider changes needed and to note down suggestions for improvement.

- What needs to be done?
- Who should do it and who should be involved in the task?
- When should it be ready?

The suggested areas and tasks for improvement can be compiled into an action plan for Quality Improvement that can be included in the future work plans of the project.

In general, the more positive answers there are, the better the quality. If there are very many negative answers, the project might need fundamental changes.



4 THE CONTENT OF THE *Succeed* TOOL

Succeed is based on success factors in population-based health promotion and prevention. The evidence from this research has been developed into questions. The tool is divided into four parts:

Part 1 contains an introduction to the tool and its use. You are currently reading an extended version of Part 1.

Part 2 contains the questionnaire for the quality improvement activity to be filled in by you/ your group. The questions are divided into three categories that are frequently used in QA and QI methodology and are interdependent. Each category contains sets of questions to give information on indicators (important success factors). An overview of the indicators is given in the table below.

	Indicators
Structure How a project or programme is organised	<ul style="list-style-type: none"> ■ Goals ■ Key Population(s) ■ Approach ■ Responsibility ■ Organisation ■ Resources
Process How activities and important tasks are carried out in the project	<ul style="list-style-type: none"> ■ Support and Participation ■ Networks ■ Reach and Response
Results What changes, intermediate results and other results have been obtained and how they are measured/ documented	<ul style="list-style-type: none"> ■ Measuring Effects ■ Environmental, Operational and Social Changes ■ Sustainability

Part 3 contains examples of how three projects have answered the questionnaire in Part 2. One project on men who have with men (MSM) – the MMSM project) – one project on incarcerated youth – the Saphy project) – and one project on people who inject drugs (PWID). If you do not understand how a question could be answered, you can see how these projects answered in different ways and let this guide you. The answers are there to help you understand the methodology of the tool. To be able to do this, it is recommended that you read the cases and the answers together before you start filling in the questionnaire about your own project. This is especially important for facilitators.





5 WHO CAN USE *Succeed*

Any project, programme or organisation working with population-based health promotion and prevention with the aim of preventing HIV or promoting SRHR can use *Succeed*. These can be large or small-scale projects and campaigns run by NGOs or the public sector, projects or programmatic approaches in specific sectors such as schools or health services, or efforts made by care or social services to reach out to key populations. The only requirements are a defined goal and a defined plan and operations. For the purpose of *Succeed* and its documents, all such operations are called projects, even if they do not meet all formal criteria for a project (such as defined budget or a clear timeframe).

Succeed can be used to review and planning ongoing projects or as a format for formative evaluation after completion of a project. *Succeed* has been used by small and large projects, new and well-established projects; these may be stand-alone projects or organisations running similar projects in different places.

Succeed is not designed to be a planning tool. However, it can be used to review a plan for a health promotion/ prevention project to ensure the quality.

The easy-to-use questionnaire makes it accessible to representatives of target groups, volunteers and professionals alike. It also makes it possible for them to work together. Evaluations of the original tool 'How to *Succeed* in health promotion' have shown that different stakeholders improved their understanding of the project, as well as of their own role in its activities and results.

6 POSITIVE AND NEGATIVE CONSEQUENCES OF USING *Succeed*

The positive consequences of using *Succeed* have already been mentioned in Section 2:

- The project will improve, work with better quality and have a greater chance of success.
- The people participating in the work with *Succeed* will become more engaged.
- It will enable better documentation and reporting.

However, there are also possible negative consequences of using *Succeed* if:

- Important decision makers do not understand the difference between QI and evaluation and consider the exercise a formal evaluation
- Serious deficiencies in the project are discovered when using *Succeed*, causing the people involved to become defensive and resistant to change.

It is therefore crucial that the activity is well prepared with all relevant stakeholders and staff. The people responsible for QI must be able to decide for themselves how information from the QI activity should be communicated to decision makers and stakeholders. All participants must be informed about this beforehand.



Deciding on QI activities

It is up to the project management or others responsible to decide on doing a QI activity and to use *Succeed*. They must define the project to be reviewed.

If you want to use *Succeed* for more than one project, it is best to have a *Succeed* process for each project and to document each project separately in the *Succeed* questionnaire. If you use *Succeed* for a large and complicated project, it is advisable to divide it into parts – for example: The overall project, an outreach component, an education component etc.

In any organisation, large or small, it is important to make a clear decision about doing QI. It is also important that a person with decision-making powers for the project participates. Otherwise it might prove difficult to obtain approval for the improvements and changes that result from QI. Such a person could be the project manager, the head of the organisation that runs the project, or a board member. Someone should also be appointed to organise the QI activity, the *Succeed* event and carry out/manage the activities listed below. Depending on the scope of participation, the planning, preparation and follow up after the event can take between 3–6 days of work.

The *Succeed* activity - organisation, time and preparations

As mentioned before, *Succeed* can be used for a group workshop where participants discuss and answer the questions together. This has been evaluated and found to be a good method. The workshop group should not be too big, i.e. a maximum of 12. If the group is larger, it is advisable to divide into smaller groups and then meet up to compare and discuss what needs to be done, possible solutions and courses of action. A larger group will make it necessary to use more than one facilitator to bring it all together.

Another approach is to ask a number of key people and stakeholders who are familiar with the project and who have different backgrounds to fill in the questionnaire independently and then meet to compare and discuss their answers. This approach makes larger demands on all participants to familiarise themselves with *Succeed*.

It is also possible for the project management to fill in the questionnaire in order to have a platform for new strategies. With this option, however, they will miss out on participation, which ensures that blind spots are uncovered through a range of perspectives. It is a key element in QI and an investment in future work and collaboration.

Set aside a minimum of one day for the work. Depending on the scope of the project, there may be a need to collect data to answer the questions. For larger projects and for large groups two days are often needed. You also need to set aside an extra ½ day after 2–3 weeks to complete the questionnaire in case you find that you need to do some extra data collection. This is best done from the start. If you do not need the data collection or extra time, it is





easier to cancel than to find time at short notice. When calculating time, please remember to include time for data collection if you think it is needed.

It is advisable to meet or at least have a phone conversation to share information on *Succeed* and the planned event with all participants before the invitation is sent out. There is a booklet format of the Questionnaire to print out and give to participants. There should be a written invitation. The invitation should state the purpose of the activity and explain that the participants are chosen for a reason and should be able to participate throughout the workshop.

If you use the workshop format, the rooms should be able to accommodate group work if it is necessary to divide the group into smaller groups. You should have flipchart, whiteboard etc. and anything you might need for participatory activities. The group should not sit as in a classroom, but rather in a circle with or without tables. The facilitator should advise on rooms and equipment.

Documentation

Documentation is an important aspect of the *Succeed* activity. The questionnaire comes in an interactive PDF which can be downloaded to a computer and then filled in during the workshop. All agreed answers, references to facts supporting the answers, and suggestions for next steps (what, who and when) should be noted. This can be done directly in the questionnaire. Whose task this should be should be decided beforehand. Sometimes the facilitator feels comfortable doing it – but it is recommended to bring in a separate person for this task.

Include important target groups, implementers and stakeholders in the QI activity

The straightforward approach of *Succeed* and its comparatively easy language makes it possible to use for professionals and lay people alike and together. It is therefore possible and very advantageous that people who work in the project on a daily basis (the project team), representatives of volunteers, representatives of direct target groups and of persons from the key populations benefiting from the project take part in *Succeed*. If the project depends on collaboration with other organisations, it is also beneficial to invite representatives from these partner organisations.

A range of different participants will ensure that a broad review is made and that indicators are highlighted from many angles. This is a good way to handle the complexity that most projects face.

Joint analysis will also help to create consensus on steps that have to be taken. Evaluations of the original tool² have shown that participants will become more aware of what has already been accomplished as well as their own role in the project.

² How to succeed in health promotion -.see *Succeed* a knowledge-based tool on www.qualityaction.eu



Use a workshop leader or a neutral facilitator

Evaluations of the original *Succeed* tool have shown that a neutral facilitator was beneficial for a group workshop. The best approach was to use a facilitator who had received some training in facilitating *Succeed*. This is especially important when the organisation responsible does not have experience of QI or QA and when participants in the exercise have not done this before or have different roles and backgrounds. If there is no neutral facilitator, there is always a risk that people will avoid embarrassment by not stating uncomfortable facts or criticism or have difficulties opposing someone they feel has more power or status. They may also take the questions too lightly and give very superficial answers. A *Succeed* facilitator should always be able to challenge the participants to give answers that make sense, are credible and can be defended if challenged.

It is of course also possible to select someone in the organisation to lead the workshop. Some have found it useful to have two persons appointed to lead the workshop. They can alternate between documentation and facilitation. This is especially useful if one of the facilitators is in a managerial position. It demonstrates that the *Succeed* event is a special event where people can participate on the same terms and change roles. It is crucial that this/these person(s) are allowed time to prepare, read the *Succeed* tool and devote some time to the case examples and their answers. In some countries there might be opportunities for training. This is highly recommended. It can be valuable for an organisation to have a trained facilitator for QI.

Answer the relevant questions

If any question in the questionnaire seems irrelevant for your project, you do not have to answer it, but please state why you do not find the question relevant. It is also possible for you to add specific questions relevant for your project. Please keep to the methodology by formulating questions that can be answered with yes or no and where the answers can be supported by data or other facts.

The Questionnaire can sometimes seem a bit repetitive. This is because some of the indicators are slightly overlapping. If you think that you have already answered a question earlier, please just refer to that answer and move on.

The questionnaire can be answered at different levels of ambition

You will find that the questionnaire can be answered more or less thoroughly. If the project is new and/or small, some of the questions might be able to be answered with a simple yes or no and a few facts. A day or sometimes less is then usually enough to complete *Succeed*. The bigger the project, or the longer it has been running, the more answers can be given and the more data is needed to make





answers valid and reliable. To answer some questions you might need to conduct small surveys, telephone interviews with key people, or go through old meeting minutes.

If this is the case, use the first workshop to answer the questions that you can respond to there and then. Then decide how to collect the information that is needed for the other questions. Divide tasks between relevant participants who can collect the data needed. It might be that you need data from a collaborating partner or that there needs to be a survey of individuals from the key population. Then use the second meeting to complete the questionnaire while sharing the information collected within the group. Consider whether some of the data collection that has been done could or should be repeated systematically to monitor the quality of the project. This could be one of the steps taken to improve monitoring.

When all the questions on one indicator have been completed, i.e you have made your assessment of that indicator, you should reflect on the need for improvements, changes and steps to take. If questions on an indicator are answered by many answers like 'No', 'We did not do X', 'We do not have Y', there is usually a need for improvement. You need to consider and discuss what can be done, if it is meaningful, what resources are needed and if it is cost-effective. These suggestions should be written down in the questionnaire and will form suggestions and ideas for your action plan for improvement. If, on the other hand, you have answered many with 'Yes we have this' or 'Yes we have done that', the assessment confirms that the quality is good in that particular area. Then you should also note that and highlight some achievements.

Need for measurement, surveys and investigation

As stated above, you might need different types of systematic data collection to have credible and reliable data for answers to the questionnaire and as a basis for future actions. Usually you need more than one methodology. *Succeed* does not provide this type of methodology (although some types are mentioned in the examples).

If you do not have this expertise within your group or organisation, information on different types of data collection methods can be obtained from public health or social studies departments at universities or from relevant public health departments at local or national level. There is usually a national HIV programme with staff that can advise you and larger NGOs might have a research and development officer. The methodology to use can be derived from scientific methodology but simplified and adapted to the needs of a local project. Better to keep it simple than not do it at all. Better to collect information on three important items than nothing or try to collect so much information that you cannot manage it. In the PQD³ tool there are also examples of participatory methods that can be used for collecting information.

³ See www.pq-hiv.de/en or www.qualityaction.eu



Regular follow up and information

After completing the questionnaire, it is advisable to let participants reflect on the exercise they have been through. You also need to have a strategy for how to use the results. It is advisable to outline this to the participants at the end of the exercise.

The action plan that comes out of your efforts should be communicated to the relevant people.

There should then be regular follow up on formal decisions about the suggestions and how the work is progressing. This can also be communicated to participants in the *Succeed* event. Many of them have invested their time and commitment. They will be motivated to make changes and can be your best advocates and implementers when such changes are needed.

If these things are done, it will be easier to repeat QI within the project or organisation on a regular basis. All health promotion and prevention is highly contextual. Adaptation is always needed throughout the project timeframe. QI is the method to adapt your work to a changing and complex reality.