

CDC Social Networks Team

Instructions for creating Social Networks Testing monitoring and evaluation plan

1. Insert your program name and agency name on the next page (at the bottom).
2. Beginning on Page 4, complete each section of this document based on the instructions provided. All instructions are provided in brackets.
3. Delete all brackets when you are finished. Also delete this instruction page.



Social Networks Testing

A Community-Based Strategy for Identifying Persons with Undiagnosed HIV Infection

Monitoring and Evaluation Plan

[PROGRAM NAME]
[AGENCY NAME]



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SECTION TWO: PROGRAM EVALUATION **Error! Bookmark not defined.**

SECTION ONE: PROGRAM MONITORING

The [AGENCY NAME] social networks testing program will be monitored in an ongoing manner and information obtained through monitoring will be used to improve program performance. The following four domains will be monitored:

- Program implementation and management
- Program processes
- Program performance
- Achievement of goals and objectives

Part 1: Monitoring program implementation and management

The first domain addressed by the plan is *monitoring of program implementation and management*. Implementation and management activities include administrative tasks such as hiring staff, purchasing equipment, and developing policies and procedures. These types of activities will be monitored with the timeline below to ensure critical operational issues are being addressed and that program implementation is on schedule.

The timeline for the [AGENCY NAME] social networks testing program is provided below.

[Complete the timeline below by adding administrative tasks that will be monitored, the projected start and completion dates for these tasks, and the actual start and completion dates. In the far right column, document any successes or barriers experienced when completing a given task, including solutions used to address barriers. This timeline should be updated regularly throughout the program period.]

Task	Start Date	Completion Date	Successes, Barriers, Solutions
1.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
2.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
3.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
4.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
5.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	

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Task	Start Date	Completion Date	Successes, Barriers, Solutions
6.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
7.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
8.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
9.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
10.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
11.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
12.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
13.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
14.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	
15.	<i>Projected:</i>	<i>Projected:</i>	
	<i>Actual:</i>	<i>Actual:</i>	

Part 2: Monitoring processes

The second domain addressed by the plan is *monitoring of key program processes*. The social networks program for [AGENCY NAME] includes four phases:

- Recruiter Enlistment
- Engagement (Orientation, Interview, and Coaching)
- Recruitment of Network Associates
- Counseling, Testing, and Referral (CTR)

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Each phase consists of a sequence of steps or processes. [AGENCY NAME]'s implementation plan and flow diagram identifies the key processes in the program and describes how staff initially plan to accomplish each process. Processes will be monitored periodically to identify successes and barriers associated with program implementation. Processes will be monitored by reviewing qualitative data collected via: input from advisory groups in the target population, notes of outreach and project coordinator staff, meeting minutes, weekly activity reports, and/or interviews with staff.

Key processes for each phase are listed on the following pages.

[Document successes and barriers experienced for each process in the tables. Also document solutions that were used to address the barriers. These tables may be updated regularly throughout the program period.]

Recruiter Enlistment Phase

Processes	Successes, Barriers, Solutions
1. Identify potential recruiters (both initially and on ongoing basis)	
2. Screen potential recruiters for eligibility	
3. Contact potential recruiters and invite them to participate in the project	

Engagement Phase

Processes	Successes, Barriers, Solutions
1. Orient recruiters, explain recruitment options, provide PCRS information	
2. Elicit network associate	
3. Develop a plan for recruiting network associates and arrange follow-up with recruiters	
4. Coach recruiters to do recruiter referral	

Recruitment of Network Associates Phase

Processes	Successes, Barriers, Solutions
1. Recruiter contacts network associates and recommends counseling and testing	
2. Recruiter escorts network associates to CTR site or provides CTR referral information	
3. Verify that network associates reported for CTR and link network associates to specific recruiters	

Counseling, Testing, and Referral Phase (General)

Processes	Successes, Barriers, Solutions
1. Assess participant risk, provide information, recommend testing, obtained informed consent	
2. Provide HIV prevention counseling (before or after testing, for both rapid and standard tests)	

Counseling, Testing, and Referral Phase (Network Associates Receiving Standard Tests)

Processes	Successes, Barriers, Solutions
1. Collect and process specimen	
2. Provide and explain test results	
3. Attempt to re-contact associates who do not return for test results	
4. For individuals testing positive: <ul style="list-style-type: none"> a. Provide HIV prevention counseling b. Refer for medical evaluation and care c. Refer for PCRS d. Assess need for other services and offer referrals 	
5. For individuals testing negative, characterize the client as high-risk or low-risk	
6. For individuals characterized as high-risk, HIV-negative: <ul style="list-style-type: none"> a. Provide HIV prevention counseling b. Assess need for other services and offer referrals c. Recommend and schedule follow-up testing 	
7. For individuals with indeterminate tests: <ul style="list-style-type: none"> a. Recommend and schedule follow-up testing b. Provide HIV prevention counseling 	
8. Follow up on referrals	

Counseling, Testing, and Referral Phase (Network Associates Receiving Rapid Tests)

Processes	Successes, Barriers, Solutions
1. Collect specimen and conduct rapid test	
2. Provide and explain rapid test results	
3. Attempt to re-contact associates who do not receive rapid test results	
4. For individuals with preliminary positive rapid test results: <ul style="list-style-type: none"> a. Recommend confirmatory test b. Provide HIV prevention counseling c. For individuals declining confirmatory testing, assess need for other services and offer referrals 	
5. For individuals testing negative on rapid test, characterize the client as high-risk or low-risk	
6. For individuals characterized as high-risk, HIV-negative: <ul style="list-style-type: none"> a. Provide HIV prevention counseling b. Assess need for other services and offer referrals 	

Counseling, Testing, and Referral Phase (Network Associates Receiving Rapid Tests)

c. Recommend and schedule follow-up testing	
7. For individuals with invalid rapid tests, repeat rapid test (for first invalid test) or follow protocol for repeated invalid tests	
8. Follow-up on referrals	

**Counseling, Testing, and Referral Phase
(Network Associates Receiving Confirmatory Tests for Preliminary Positive Rapid Tests)**

Processes	Successes, Barriers, Solutions
1. Collect and process specimen	
2. Provide and explain test results	
3. Attempt to re-contact associates who do not return for test results	
4. For individuals testing positive: a. Provide HIV prevention counseling b. Refer for medical evaluation and care c. Refer for PCRS d. Assess need for other services and offer referrals	
5. For individuals testing negative, characterize the client as high-risk or low-risk	
6. For individuals characterized as high-risk, HIV-negative: a. Provide HIV prevention counseling b. Assess need for other services and offer referrals c. Recommend and schedule follow-up testing	
7. For individuals with indeterminate tests: a. Recommend and schedule follow-up b. Provide HIV prevention counseling	
8. Follow up on referrals	

The flow diagrams on the following pages represent [AGENCY NAME]'s social networks testing processes.

[On the next page, insert your agency's high-level flow diagram]

[On the next few pages, insert your agency's detailed flow diagram]

Part 3: Monitoring program performance

The third domain addressed by the monitoring plan involves *monitoring of program performance*. This type of monitoring involves quantitative measurement of the performance of key steps or processes. [AGENCY NAME] will collect performance monitoring data in both aggregate and client level format.

Performance data for each phase are listed below, along with sources from which the data will be obtained.

[Add additional performance measures and data sources specific to your program below. Modify tables as needed.]

Recruiter Enlistment	
Performance Measures:	Data Source:
1. Number of persons invited to serve as recruiters.	Recruiter Enlistment/ Orientation Log
2. Number of persons who agreed to serve as recruiters (i.e., accepted the invitation to participate in the project).	Recruiter Enlistment/ Orientation Log
3. Number of persons enlisted as recruiters who were previously network associates.	Recruiter Enlistment/ Orientation Log
4. Reasons given for why potential recruiters declined invitation (i.e., why they did not want to enlist).	Recruiter Enlistment/ Orientation Log

Engagement Phase	
Performance Measures:	Data Source:
1. Number of persons who continued as recruiters with the project after receiving orientation.	Recruiter Enlistment/ Orientation Log, Participant Data Form
2. Reasons why recruiters did not continue past orientation.	Recruiter Enlistment/ Orientation Log
3. Demographics (age group, gender, race and ethnicity), HIV risk category, and HIV status of recruiters who continued past orientation.	Participant Data Form
4. Number of network associates identified by or elicited from recruiters. (This figure represents total number of network associates elicited from all recruiters combined, not necessarily the total number of unique individuals elicited.)	Participant Data Form
5. Number of network associates for whom full names were elicited from recruiters.	Participant Data Form
6. Number of network associates for whom only partial names were elicited.	Participant Data Form
7. Number of network associates elicited who were anonymous.	Participant Data Form

Recruitment of Network Associates Phase	
Performance Measures:	Data Source:
1. Number of network associates successfully contacted and offered HIV CTR.	Participant Data Form
2. Demographics (age group, gender, race and ethnicity), HIV risk category, and HIV status of network associates who are successfully recruited.	Participant Data Form

Counseling, Testing, and Referral Phase	
Performance Measures:	Data Source:
1. Number of network associates contacted who received HIV CTR.	Participant Data Form
2. Number of tested network associates who test positive.	Participant Data Form
3. Number of network associates testing positive who receive their test results.	Participant Data Form
4. Number of network associates testing positive who are successfully referred for medical evaluation and treatment.	Participant Data Form
5. Number of network associates testing positive who are successfully referred for PCRS.	Participant Data Form
6. Number of network associates testing positive who are successfully referred for HIV prevention services.	Participant Data Form
3. Number of tested network associates who test negative.	Participant Data Form
4. Number of network associates testing negative who are high-risk.	Participant Data Form
5. Number of network associates testing negative who receive their test results.	Participant Data Form
6. Number of network associates testing negative who are successfully referred for HIV prevention services.	Participant Data Form
7. Number of network associates whose tests are indeterminate.	Participant Data Form
8. Number of network associates testing indeterminate who receive their test results.	Participant Data Form
9. Demographics (age group, gender, race and ethnicity), HIV risk category, and HIV status of network associates who received HIV CTR.	Participant Data Form

Part 4: Monitoring achievement of goals and objectives

The fourth domain addressed by the monitoring plan is *monitoring the progress made toward achieving goals and objectives*.

Program goals

[AGENCY NAME]'s goals for the social networks testing program are listed below. These goals are also listed in the implementation plan.

[List your program goals in the table below.]

Program Goals
1.
2.
3.

Process and outcome objectives

Process and outcome objectives will be monitored by [AGENCY NAME] to assess progress made toward achieving program goals. [AGENCY NAME]'s process and outcome objectives for the social networks testing program are listed below.

[List process and outcome objectives in the tables below. Use the tables to document projected or targeted numbers that you wish to achieve for each objective for each quarter and at the end of the year; also document the actual numbers that were achieved for each objective. Indicate successes or barriers experienced, and any solutions used to address barriers.]

Recruiter Enlistment Phase											
Objectives	Year 1					Year 2					Successes, Barriers, Solutions
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	
Process objectives											
1.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
2.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
3.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					

Engagement Phase											
Objectives	Year 1					Year 2					Successes, Barriers, Solutions
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	
Process objectives											
1.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
2.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
3.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					

Recruitment of Network Associates Phase											
Objectives	Year 1					Year 2					Successes, Barriers, Solutions
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	
Process objectives											
1.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
2.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
3.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					

Counseling, Testing, and Referral Phase											
Objectives	Year 1					Year 2					Successes, Barriers, Solutions
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	
Process objectives											
1.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
2.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
3.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					

Counseling, Testing, and Referral Phase

Outcome objectives

1.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
2.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					
3.	<i>Projected:</i>					<i>Projected:</i>					
	<i>Actual:</i>					<i>Actual:</i>					

Part 5: Vignettes

Interesting or informative stories or lessons learned while implementing the social networks testing program may be documented in vignettes than can be shared with other agency staff.

[Use the form below to document a vignette to share with other staff.]

Instructions:

Use this form to document any “story” related to the social networks testing program that you think is particularly interesting or important. This may be a “story” about:

- a specific staff member, recruiter, or network associate
- a special experience or situation
- a problem not captured in any other forms provided for this program
- a method you have developed for doing a challenging task related to the program
- anything else related to this project that you think should be documented or shared

Please use this space to describe your “story” (continue on back if necessary):

Please use this space to describe the lessons to be learned from your “story” (continue on back if necessary):

SECTION TWO: PROGRAM EVALUATION

Evaluation questions and comparisons that are of interest to **[AGENCY NAME]** are listed below.

Program Evaluation
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.