



A Malaria Elimination Guide to Reactive Case Detection (RACD) Monitoring & Evaluation Tool

Module 3: Evaluating Standard
Operating Procedures

The Malaria Elimination Initiative

UCSF Institute for
Global Health
Sciences

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shrinkingthemalariamap.org

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Introduction

The objectives of **Module 3** of the RACD Monitoring & Evaluation Tool are to:

1. Evaluate the knowledge and practices of program personnel involved in implementing case investigations and RACD.
2. Identify the challenges and gaps in conducting case investigations and RACD follow-up to support program activity improvements.

Why is Module 3 Useful?

Through the use of a standardized questionnaire, administered to program personnel involved in malaria case investigation and RACD activities, **Module 3** evaluates the knowledge and practices of program staff according to the standard operating procedures (SOPs) outlined in national malaria surveillance guidelines. If the national guidelines do not include detailed SOPs for malaria case investigation and RACD then **Module 3** may be used as a guide to develop SOPs and M&E materials for district malaria teams. Provincial and National malaria surveillance officers can use **Module 3** to determine if the program staff have SOPs available for use, their level of knowledge and practices on case investigation and RACD activities, as well as the challenges experienced. If activities are deviating from the SOPs, **Module 3** may provide an understanding into the reasons why. Once any knowledge gaps are identified, they can be addressed. If necessary, additional trainings can be provided to staff conducting malaria case investigation and RACD activities to ensure that they are being done according to the SOPs.

Who Should Use Module 3?

The RACD M&E tool will be led by a provincial-or national-level malaria program manager or surveillance officer. This lead individual will need to modify the MS Word Questionnaire and Excel Workbook so they are the same questions included in both. **Module 3** will be implemented by each provincial-and/or district-level surveillance officer who regularly conducts case investigation and RACD follow-up. Results from all participants will need to be collected and input manually into the MS Excel template for analysis.

How is Module 3 Used?

Module 3: Evaluating Standard Operating Procedures includes a series of Excel worksheets, a corresponding key activities questionnaire template and manual to aid provincial- and district-level surveillance officers and personnel in the evaluation of key knowledge and practices of malaria case investigation and RACD activities. The workbook for **Module 3** is available on the 'Tools' section of the Malaria Elimination Initiative's website: www.shrink-ingthemalariamap.org. The accompanying materials to complete **Module 3** include:

1. **Module 3** Manual
2. Evaluating Standard Operating Procedures Excel Workbook
3. Key Activities Questionnaire (MS Word) template

Once you have completed **Module 3**, send related files and data to the individual who is leading the module in your province, region or national-level so they can organize the results.

Where Has Module 3 Been Used?

The RACD M&E tool and its modules were piloted in several malaria-eliminating settings, including provinces in Cambodia, China, Indonesia, South Africa, and Thailand. The tool has since been implemented in Zanzibar, along the Myanmar border (Yunnan Province, China) and scaled-up nationally in Thailand. As a result of implementing the tool, and thereby having an improved understanding of operational gaps, several countries conducted national- and regional-level trainings on surveillance and case investigation, and indicators from the tool were integrated into the national malaria database to ensure standardized reporting.

Results from **Module 3** have identified that malaria case investigation and RACD practices vary widely. For example, the minimum geographic screening radius for RACD was different between study areas and within provinces: 40% (4/10) of respondents in China stated 50-100m radius, 44% (15/34) in Indonesia stated 100m, and 1 or 2km (18% each; 2/11) in Thailand. These findings highlight the need to routinely evaluate and standardize the operating procedures for case investigations and RACD activities across settings.

Module 3 Includes:

1. **Module 3 Manual**, a step-by-step guide to support provincial- and district-level surveillance officers in the questionnaire administration (this document).
2. Evaluating Standard Operating Procedures Excel workbook to enter questionnaire responses from surveillance personnel. Tabs in this workbook include:
 - Instructions
 - Questionnaire Response Entry
 - Summary and Analysis
3. Key Activities Questionnaire (MS Word) template

By following the **Module 3 Manual** and using the **Evaluating Standard Operating Procedures Excel workbook along with the Key Activities Questionnaire**, the provincial or district surveillance officer and personnel can assess whether standard operating procedures (SOPs) are available, evaluate the knowledge and practices and understand the challenges of program personnel involved in the process. Provincial and National malaria surveillance officers can use **Module 3** to identify gaps in routine activities and advocate for additional trainings if necessary. This effort can bolster surveillance staff knowledge to conduct these activities and provide an opportunity for surveillance staff to highlight important challenges experienced.

After You Complete Module 3:

The findings generated from completing **Module 3** can be used in provincial- and district-level annual and biannual meetings and presentations. Each district malaria surveillance officer will send their completed questionnaire to the provincial- or national-level surveillance officer in charge of the **Module 3** evaluation. This individual will collate responses from other malaria surveillance officers from other districts to monitor and evaluate the knowledge, practices and challenges of district-level malaria personnel conducting case investigation and RACD activities. The following instructions and activities correspond to the Malaria Indicators Excel workbook.

Getting Started

The following instructions and activities correspond to the Evaluating Standard Operating Procedures Excel workbook and Key Activities Questionnaire.

Before you start reviewing the Evaluating Standard Operating Procedures Excel workbook and Key Activities Questionnaire template, please do the following:

1. Read this document to become familiar with [Module 3](#).
2. Open the Evaluating Standard Operating Procedures Excel workbook and read the instructions worksheet to become familiar with the data entry process in [Module 3](#).

Workflow Summary

The national- or provincial-level manager or surveillance officer will format the Evaluating Standard Operating Procedures Excel workbook and Key Activities Questionnaire template for [Module 3](#) to fit the local malaria program context. Instructions for setting up the Evaluating Standard Operating Procedures Excel workbook can be found in the *RACD Monitoring and Evaluation Tool User Guide for National Surveillance Officers and Personnel*. This is a separate manual targeted for National-level surveillance personnel that includes set-up instructions for all RACD M&E Tool modules and corresponding workbooks as well as instructions for collating and analyzing results across provinces and the country. The steps below summarize the workflow to complete [Module 3](#).

Step 1

Ensure the file name matches the district and date of when the survey will be completed for both the MS Excel and Word documents. The suggested format for the Word template is: "District_monthyear_Key-questions.doc". The suggested format for the Excel summary sheet is "District_monthyear_SOPs.xls". Include both the district name and date (including month) for which the data is being included in the evaluation. If the questionnaire has been printed then please ensure the file name and date is clearly written at the top of the page. No personal identifiers should be included to maintain privacy in the responses to promote an honest answer.

Step 2

Send to all of the district-level (and below) malaria surveillance personnel a copy (hard or soft) of the Key Activities Questionnaire template for each person to complete. They should be instructed to complete the Key Activities Questionnaire with full honesty. No personal identifiers from the respondents should be included. Remind them that they if they are completing the questionnaire in soft copy, that they should save frequently. Request that they send the completed form back to you.

Step 3

Once the completed questionnaires from all district-level surveillance staff are sent back to the district or provincial level surveillance officer leading the evaluation, this person will collate all of the responses into the Evaluating Standard Operating Procedures Excel workbook.

Step 4

After all of the district-level responses have been entered into the Excel workbook, save and send the completed document to the individual who is leading the module evaluation at the national level for review and analysis.