National Strategic Planning for Tuberculosis & programme review

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Overview

- Introduction
- Developing NSP
- Programme review
- Country coordination
Introduction
Guidance

- Guidance for national strategic planning for TB:
  - Published in July 2022, available in English and French. [https://www.who.int/publications/i/item/9789240052055](https://www.who.int/publications/i/item/9789240052055)
  - Factsheet with key points available online

- Web-based TB plan costing tool development (WHO Integrated health tool: for planning and costing, TB)
  - In progress (Q1, 2023)

- Dissemination and capacity building
  - Global webinar organized, presented in Regional fora/meetings, and various international fora
  - Country specific workshop (as per request from the country)
  - E-course development in progress (available by Dec)
Learning from COVID 19 pandemic

• Reversed progress in health and development worldwide.

• Progress in TB care and prevention has been particularly affected,
  • with redirection of human, financial and other resources
  • public health measures restricting movement of people
    have resulted in reduced access to TB services.

• The pandemic has highlighted the critical need to
  • Strengthen resilient health system
  • ensure maintenance of quality essential health services
    during emergencies.
TB programme management cycle

1. Strategic planning
2. Planning (and reprogramming)
3. Resource mobilization
4. Implementation and monitoring
5. Review and evaluation
What is a national TB strategic plan

A national strategic plan for TB is a key document

• Guides national authorities and stakeholders
• Describes how to comprehensively address the TB epidemic through interventions within the health sector and across other sectors.

Strategic planning is a critical step towards achieving End TB Targets and Goals.
The role of strategic planning

- linkage with UHC and PHC agenda, with a human rights-based approach
- assess the country’s situation, through critical interdisciplinary and multisectoral review
- adopt and adapt international commitments
- Translate global guidance into the local context;
- the identification of relevant stakeholders
- builds capacity of all stakeholders including TB-affected communities
- collective exploration of the underlying causes and system factors;
- building consensus on the NSP interventions, and of services
- increase awareness and strengthen the political commitment
- mobilize the required resources.
### Key Considerations

<table>
<thead>
<tr>
<th>Alignment with national health plan and cycle</th>
<th>Government stewardship and ownership</th>
<th>Comprehensive covering all pillars of the End TB strategy</th>
<th>Engagement of relevant sectors and stakeholders (within and beyond health) linking MAF</th>
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<tbody>
<tr>
<td>Inclusion of civil society, TB affected communities</td>
<td>Consideration of gender, equity and human rights</td>
<td>Social protection and addressing social determinants</td>
<td>Investing time and resources in the NSP development process</td>
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<td>People-centred, leveraging data</td>
<td>Contingency planning</td>
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Government-led process, with stakeholder engagement and participation

**Phase 1 – Planning and preparation**
- Establishing a core organizing team
- Developing a costed roadmap
- Confirming and mobilizing resources

**Phase 2 – Conducting the situation analysis**
- Review of epidemiology and determinants of TB
- TB programme review
- Data and evidence consolidation
- Synthesis by stakeholders

**Phase 3 – Formulating goal(s), objectives, interventions and activities**
- Formulating goal(s) and objectives
- Identifying priority interventions
- Determining epidemiological (coverage) targets
- Formulating activities and subactivities
- Contingency planning

**Phase 4 – Developing the metrics and activities for monitoring, evaluation and review**
- Formulating indicators and targets for activities and subactivities
- Outlining activities for monitoring, evaluation

**Phase 5 – Costing**
- Producing cost estimates
- Identifying projected funding and sources

**Phase 6 – Consensus and endorsement, dissemination and resource mobilization**
- Consensus and endorsement
- Dissemination and advocacy
- Resource mobilization

9–12 months

MOH: ministry of health; NSP: national strategic plan; TB: tuberculosis.

* This includes review of social determinants.

* This includes review of aspects of the health system as well as other sectors that are relevant to the country’s TB response. This can be primarily informed by a desk review of the relevant reports, as well as inclusion of the most pertinent aspects in the TB programme review.
Phase 1: Planning and preparation

A core organizing team
• Secretariat
• Conduct mapping
• Coordinate all stakeholders
• Develop plan
• Mobilize support
• Oversee the process

A detailed roadmap
• key timelines and milestones
• Stakeholders’ roles and responsibilities
• Estimated financial and technical resource

Resource mobilization
• The resources quantified,
• Resources mapped
• Gaps mapped.
• local and international partners be engaged as necessary
Phase 2: Situation analysis

**Review of epidemiology and determinants**
- the burden of TB and the characteristics of the TB epidemic
- Key drivers of TB epidemic

**TB programme review**
- assess the implementation of an NSP
- evaluate health system factors

**Consolidation of data and evidence**
- The organization of data from multiple sources
- PCF is one of the tool to organize data and information on TB along the continuum of care.

**Synthesis**
Stakeholder consultation is a critical step to ensure that the data and evidence are contextually interpreted and analyzed
Phase 3: Goal(s), objectives, interventions

Formulation of goals and objectives

- Goal aligned to the End TB Strategy and/or the national health sector plan goals
- Objectives should be SMART (specific, measurable, attainable, realistic and time-bound)

Priority interventions

- Interventions are informed by the gap and the root cause analyses.
- Various tools can be used such as, The PCF, TB impact modelling, Allocative efficiency modelling
- consider the values and perspectives of the affected communities
- ethically sound, be gender transformative and contribute to protecting human rights and promoting equity.

Determining targets

- Consider multiple factors including the epidemiology of TB and its determinants, demography, economic performance, political developments, planned activities in other relevant sectors and the relative significance of TB in the country compared with other health priorities.
- There is no standard formula.
Phase 3: Goal(s), objectives, interventions

**Formulation activities and sub-activities**

- Activities and sub-activities to be implemented under each intervention to achieve the objectives should be developed, and should contain sufficient detail.
- Includes timing, quantity, person responsible, resources required, and methods and indicators for monitoring.
- Operational planning should be flexible and responsive.

**Contingency plan**

- The NSP should detail contingency measures to be taken in the event of major disruption to the provision of TB services and identify of potential risks or events which may cause major disruption to the provision of TB services.
- Coverage and quality of TB services is under the purview of the national health cluster during emergencies.
- The national health strategy and the TB NSP should define ways of preserving the minimum acceptable level of essential services.
Phase 4: Monitoring, evaluation and review

Development of the M&E component of the NSP

- Establish a small coordinating team
- Review activities and subactivities in the NSP
- Identify and define indicators
- Develop a draft of the M&E component
- Review the draft with a wider group of stakeholders for NSP development

Each indicator should include: purpose of indicator, procedure of calculation, source and level of information to be collected, periodicity, entity that will collect the data, and values at baseline and targets

Outlining activities for monitoring, evaluation and review

Activities aimed at strengthening the monitoring and evaluation system, and review process should be captured in the NSP activities and sub-activities
Phase 5: Costing

- Strategic plan costing is conducted to provide:
  - an estimate of the resources required to implement the NSP interventions;
  - credible evidence for mobilization of funds from national sources and external donors;
  - a basis for financial monitoring and reporting.

- The costing process requires stakeholder participation and consultations

- Several publicly available tools are available.

- WHO Global TB Programme is updating the Web-based TB plan costing tool (WHO Integrated health tool: for planning and costing, TB)
Phase 6: Consensus & endorsement, dissemination and resource mobilisation

Consensus and endorsement
• Organization of a consensus workshop to orient key decision makers on the key contents of the plan

Dissemination and advocacy
• The main objectives of dissemination are to ensure buy-in, awareness and understanding of the strategic focus and targets by key stakeholders, which will strengthen collective ownership and facilitate implementation.

Resource mobilization
• The costed NSP is a good tool for ongoing resources mobilisation efforts
Structure

• If the country has a standard format for NSPs, it is recommended to use that format, to ensure alignment with other health sector plans as far as possible.

• It is important to maintain coherence and consistency across different sections and components of the NSP.

• A standardized numbering system should be used. A numbering system will also help with cross-referencing and linkages of the elements throughout the plan.
Components of an NSP

- Situation analysis
- Goal(s), objectives and strategic interventions
- Activities and sub-activities
- Monitoring and evaluation
- Costing and resource mapping
- Contingency measures
Programme review
What are programme reviews?

- Not an audit intended to punish poor performance or mere data verification exercise

- Evaluations that are conducted periodically and aim at identifying the strengths and weaknesses of a TB programme and providing recommendations for quality improvement, and feed into its planning cycle
TB programme cycle

Regular programme reviews are an integral component of the programme cycle and they aim to continually improve performance and achieve better results.

Supportive supervision, monitoring, evaluation and review are important to ensure that actions outlined in the national strategic plan are implemented as planned against stated objectives and desired results.
NSP development

Government-led process, with stakeholder engagement and participation

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About the guidance

▪ **Purpose:** to provide guidance on planning and managing programme reviews that enable to assess the health sector TB response and improve its performance, in line with the latest developments and global guidelines.

▪ **Target audience:** all stakeholders involved in national strategic planning for TB and in the review process
  - Ministry of Health, other government ministries, private sector, nongovernmental organisations, civil society and affected communities, technical and funding partners involved in planning, implementing and funding TB services at various levels in the health system.

▪ **Structure:**
  - **Part 1:**
    - Describes principles and processes for reviewing TB programmes
    - Organised around the essential stages of the review process
  - **Part 2:** Checklists of key review questions in main TB intervention areas, and templates to aid process
Review phases and steps

Phase I
Planning and preparation

- Step 1: Planning and preparation
- Step 2: Developing the concept note

Phase II
Pre-review

- Step 3: Review of TB epidemiology and determinants
- Step 4: Desk review

Phase III
Field review

- Step 5: Conducting the field review
- Step 6: Synthesizing findings and prioritizing recommendations
- Step 7: Debriefing

Phase IV
Post-review

- Step 8: Reporting and dissemination
- Step 9: Use of the report and linking the PR to the TB programme planning process
### Types of programme review

Programme reviews can be carried out at different stages of the programme cycle and for different purposes; same concept but different objectives!

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<th>Focus</th>
<th>Objective</th>
<th>Actors</th>
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<td>Quarterly</td>
<td>Inputs</td>
<td>Assess detailed implementation plan</td>
<td>Internal</td>
</tr>
</tbody>
</table>
| Annual         | Outputs| How well the programme is being implemented: assessing inputs, activities and outputs | ▪ Assess implementation  
▪ Modify implementation plans | Internal |
| Mid-term       | Outcomes| Is the programme moving in the right direction; progress in the services being provided (outputs) | ▪ Assess progress towards achieving programme objectives  
▪ Inform reprogramming | Internal and external |
| End-term       | Impact| How well the programme has performed in the planning period under consideration | ▪ Assess the overall performance of the programme  
▪ Inform the development of a new strategic plan | Internal and external |
Multi-stakeholder and multi-sectoral involvement: the review as a campfire

A programme review is an opportunity to bring together, mobilize and sensitise different stakeholders and sectors within and beyond health who may play important roles in TB control efforts in the country.

- Stakeholder mapping
- Consultation with people with TB, affected communities, partners in the health sectors and beyond
- Engaging actors that are not yet around the campfire
# Review teams

The diagram illustrates the structure of review teams, including team leads and members covering specific topics. Each team focuses on different thematic leads.

## TEAM 1
- **Team lead**
- Members covering specific topics

## TEAM 2
- **Team lead**
- Members covering specific topics

## TEAM 3
- **Team lead**
- Members covering specific topics

### Thematic leads
- Thematic lead C
- Thematic lead B
- Thematic lead A

The teamwork is depicted as a collaborative effort, with people working together to form a cohesive whole, symbolized by the puzzle pieces coming together.
Key messages

1. Before the review: know the context in advance
2. During the review: connect the dots, focus on why, work as a team
3. Debriefing: focus on what are the priorities for improving the programmes as a whole (how a thematic area fits into the overall programme)
Country coordination
Reviews of TB programmes and development of national strategic plans are key activities which shape the direction of TB programme at the country level. To undertake these activities, countries usually request technical assistance and funding from external partners. However, there is often a gap in the availability of information on country plans and other relevant activities taking place in these countries. There is a need to ensure alignment and complementarity in providing technical assistance in target countries. Furthermore, there are opportunities for WHO and partners to contribute to the quality assurance and utility of programme reviews and technical support for MHP development.

The country coordination platform aims to improve coordination among technical and funding partners for reviews of TB programmes and national strategic planning for countries.

Objectives of the platform:
- Information sharing at the early stage on the full continuum of TB strategic planning
- Discussion, joint planning, and harmonization of country support
- Mobilization for activities at country level
- Quality assurance
- Feedback for improvement

The full continuum of TB national strategic planning, starting from review, development of plan and grant application.
Objectives of the platform

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• Discussion, joint planning, and harmonization of country support
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• Quality assurance
• Feedback for improvement
Acknowledgements

- VCC/GTB/WHO
- WHO (HQ, Region and country office staff)
- National TB programmes
- International partners, including civil society and affected TB communities
- Funding and technical partners
- Financed by USAID and BMGF
It’s time for action
It’s time to END TB