# PHASE 2 TOOLKIT:

# PROGRAM, DISTRICT AND FACILITY-LEVEL PLANNING FOR IMPLEMENTATION OF THE 2010 REVISED WHO GUIDELINES

VERSION 1.0 (January 2011)

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# INTRODUCTION

## WHO SHOULD USE THIS TOOLKIT?

This toolkit is intended as a resource to support people engaged in program, district, and facility-level planning for implementation and roll-out of the 2010 revised WHO guidelines.

## WHAT IS THE PURPOSE OF THIS TOOLKIT?

This toolkit is the second of three integrated toolkits to support country teams in adaptation and implementation of the revised WHO recommendations in the four linked technical areas: ARV drugs for treatment of pregnant women living with HIV and prevention of HIV infection in infants, infant and young child feeding in the context of HIV, antiretroviral therapy for HIV infection in infants and children, and antiretroviral therapy for HIV infection in adults and adolescents. The Phase 1 Toolkit: *Understanding the Revised WHO Recommendations and Supporting Their Adaptation Into National Guidelines* was released in July 2010 and the Phase 3 Toolkit: *Measuring Impact and Implementation of the Revised WHO Guidelines* has an anticipated release in early 2011. Please note that these tools are living documents. They will be revised in accordance with feedback from ongoing efforts to pilot the tools in countries.

The Phase 2 toolkit is organized into nine tool sets that include various categories of implementation planning tools. In most cases these tools consist of templates, which are frameworks to help country teams think through program, district, or site implementation planning. These tools do not need to be used in a particular sequence. The nine tools sets included in this toolkit are as follows:

1. Revised National Guideline Implementation Planning Tools
2. District Implementation Roll-Out Planning Tools
3. Costing Implementation of the Revised PMTCT Guidelines Tool
4. Site Implementation Roll-out Planning Tools
5. Linkage and Integration of PMTCT and HIV Care and Treatment Site Assessment Tool
6. Development of Standard Operating Procedures Tools
7. Slide sets on the 2010 Revised WHO Guidelines/ Adapted National Guidelines
8. Monitoring and Evaluation Tools
9. Partnership Planning Tools

## HOW SHOULD THIS TOOLKIT BE USED?

- This toolkit is intended as a resource to support program, district, and site implementation planning of the revised WHO guidelines.
- The nine sections in this toolkit are structured according to different categories of implementation planning tools and are not in sequential order.
- Depending on implementation planning needs, those engaged in implementation planning may want to use some or all of the implementation planning tools contained in the Phase 2 Toolkit depending on their context specific needs.

## ADDITONAL RESOURCES:

The WHO is producing a more comprehensive adaptation guide for each set of revised guidelines to support countries as they undertake the translation procedure, which is expected to be released in mid-2010.

Any comments or questions regarding the contents of this toolkit should be sent to Elena Ghanotakis at eghanotakis@pedaids.org.

## TABLE OF CONTENTS


| Title | Type |
|---|---|
| **TOOL SET 1. REVISED NATIONAL GUIDELINE IMPLEMENTATION PLANNING TOOLS** | |
| The tools in Tool Set 1 are intended to serve as a framework to facilitate implementation planning by highlighting key issues and considerations regarding potential guideline changes, and the implications of their implementation. To assist in this effort, smaller tools are included (e.g., a summary of the new guidelines and comparison with existing national guidelines, and support tools for decision making and planning for national roll-out). | |
| 1.1 Supporting Implementation Planning | |
| 1.2 Guideline Implementation Planning Tool for PMTCT | |
| 1.3 Guideline Implementation Planning Tool for IYCF | |
| 1.4 Guideline Implementation Planning Tool for ART in Infants and Children | |
| 1.5 Guideline Implementation Planning Tool for ART in Adults and Adolescents | |
| 1.6 Inventory of Clinical Tools, Job Aids, and Information, Education and Communication (IEC) Materials To Be Updated | |
| **TOOL SET 2.PROGRAM/ DISTRICT IMPLEMENTATION ROLL-OUT PLANNING** | |
| The Program/ District Implementation Roll-Out Planning Tools contained in Tool Set 2 are designed to support program planners and district officers to think through service delivery for components of the PMTCT cascade and use this information to make program/district action plans. | |
| 2.1 Program/ District PMTCT Cascade Service Delivery Analysis | |
| 2.2 Program/ District Action Plans Template | |
| **TOOL SET 3. COSTING IMPLEMENTATION OF THE REVISED PMTCT GUIDELINES** | |
| This tool set contains a costing worksheet that can be filled out for a country, program, district, or site and submitted for entry into a model that can be used to estimate a range of costs, including drugs and programming costs, associated with implementation of the revised PMTCT guidelines. | |

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| 3.1 Costing Worksheet for Implementation of the Revised PMTCT Guidelines | |
| **TOOL SET 4. SITE IMPLEMENTATION ROLL-OUT PLANNING** | |
| The Site Implementation Roll-Out Planning Tools contained in Tool Set 4 are designed to support program implementation planners in thinking through various aspects of site-level implementation of the revised WHO guidelines in all four technical areas to inform the development of site action plans. | |
| 4.1 Site Service Delivery Analysis for PMTCT | |
| 4.2 Tool to Assess Inventory of National Guidelines Available at Sites | |
| 4.3 Tool to Assess Staffing and Training Needs for Implementation of the Revised Guidelines | |
| 4.4 Site Action Plans Template | |
| **TOOL SET 5. LINKAGE AND INTEGRATION OF PMTCT AND HIV CARE AND TREATMENT SITE ASSESSMENT** | |
| This tool set contains a description of the linkage and integration site assessment tool – the complete tool is available upon request ( see document for details) | |
| **TOOL SET 6. DEVELOPMENT OF STANDARD OPERATING PROCEDURES** | |
| The tools in Tool Set 6 are aimed at providing program, district, and site implementation planners with very simple guidance and a framework to create standard operating procedures. | |
| 6.1 Instructions for Creating Standard Operating Procedures (SOPs) | |
| 6.2 SOP template | |
| 6.3 Clinical Mentoring Guidance Tool | |
| **TOOL SET 7. SLIDE SETS ON THE 2010 REVISED WHO GUIDELINES/ ADAPTED NATIONAL GUIDELINES** | |
| The tools contained in this step provide slides with an accompanying facilitator's guide to train health care staff on the key changes inherent in the revised WHO guidelines. | |

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| 7.1<br>▪ Introductory slides<br>▪ ARV drugs for treatment of pregnant women living with HIV and prevention of HIV infection in infants<br>▪ Infant and young child feeding in the context of HIV<br>▪ Antiretroviral therapy for HIV infection in infants and children<br>▪ Antiretroviral therapy for HIV infection in adults and adolescents. | |
| **TOOL SET 8. MONITORING AND EVALUATION PLANNING** | |
| The tools contained in this tool set are designed to support program implementation planners in thinking through necessary changes to monitoring and evaluation (M&E) tools as a result of the revised WHO guidelines and to keep track of these changes in the process of implementing the revised WHO guidelines. | |
| 8.1. Checklist for M&E Tools that Need to be Changed Based on Revised Guidelines | |
| 8.2 Documentation of Changes in M&E Tools | |
| **TOOL SET 9. PARTNERSHIP PLANNING** | |
| The partnership planning tools in Tool Set 8are designed to be used in sequence to strategically identify the need for partnerships, assess potential partners, and then develop a plan for engagement with potential partners that have been identified. | |
| 9.1. SWOT Analysis Tool | |
| 9.2 Country Partner Landscape Assessment Template | |
| 9.3 Illustrative Country Partnership Menu and Plan Template | |