Local Partner Capacity Development for Going Online

TECHNICAL BRIEF

Going Online combines people and technology to create virtual health service delivery pathways, reach new clients, and provide support. Local partner capacity development is at the forefront of our engagement, ensuring tailored, scalable, and sustainable solutions.

FHI 360's Going Online team supports local partners to enhance their capacity to use virtual platforms in support of health service delivery. The process starts by recognizing and highlighting local partners' existing capacities, approaches, and systems that support virtual health service delivery. It continues through a process of co-developed plans that identify needs and strategic opportunities for capacity development to meet local partner goals and missions. Capacity is then developed by the provision of targeted technical assistance, which transfers skills required for understanding, managing, sustaining, and standardizing Going Online approaches across these six categories:

- **Plan:** Understand and engage online target audiences and plan for virtual health service delivery

- **Reach:** Generate demand for health services and reach new audiences online

- **Deliver:** Provide health services using remote and virtual channels (telehealth)

- **Engage:** Follow-up and re-engage clients over time

- **Improve:** Collect and use data to improve performance of virtual health interventions

- **Capacitate:** Increase local partner capacity to own and manage virtual health interventions

See a detailed menu of technical assistance on page 4.

ABOUT GOING ONLINE

The Going Online team supports health service delivery programs to plan, market, implement, and monitor virtual health service delivery. The portfolio started in 2017 through the LINKAGES and EpiC projects funded by USAID and PEPFAR. By 2021, the Going Online portfolio grew to support health programs in over 35 countries across the Caribbean, Africa, and Asia and have expanded beyond HIV to include COVID-19, mental health, STI, and broader sexual and reproductive health programs.

Learn more at:
https://fhi360.org/goingonline

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Adapting to context

Capacity development starts by recognizing local partners' existing capacity, as well as the contextual factors that determine its capacity development needs to support virtual health service delivery, as shown in Figure 1. FHI 360 supports local partners to self-assess their capacity for designing, implementing, monitoring, managing, and sustaining Going Online approaches. Importantly, partners may demonstrate higher capacity for some approaches or domains, and lower capacity for others. General organizational capacity assessments, such as the Non-U.S. Organization Pre-Award Survey Guidelines and Support (NUPAS) tool developed by the United States Agency for International Development (USAID), can help partners identify strengths and weakness that may impact their ability to introduce and sustain virtual health service delivery approaches.

The Online Reservation and Case Management App (ORA) is an important tool to support virtual health service delivery

Other contextual factors are also important, such as the availability of fast and reliable internet, mobile phone ownership, and internet and social media use among target audiences. Additionally, the availability of external marketing firms, creative agencies, and health service providers (including from the private sector) can also impact the opportunities for local partners to implement and develop capacity for virtual health service delivery. FHI 360 has experience supporting local partners to assess these contextual factors and provide tailored recommendations for planning virtual health service delivery.

Having the financial resources available is also critically important to determine if local partners will be able to receive relevant technical assistance and capacity development support for virtual health service delivery. Donors financing technical assistance to local partners to implement virtual health service delivery can see a set of approaches and budget inputs tailored for HIV programs in this guide. In addition to supporting technical assistance for implementation, capacity development efforts involve additional activities and require additional financial support.

FIGURE 1. CONTEXTUAL FACTORS IMPACTING LOCAL PARTNER CAPACITY
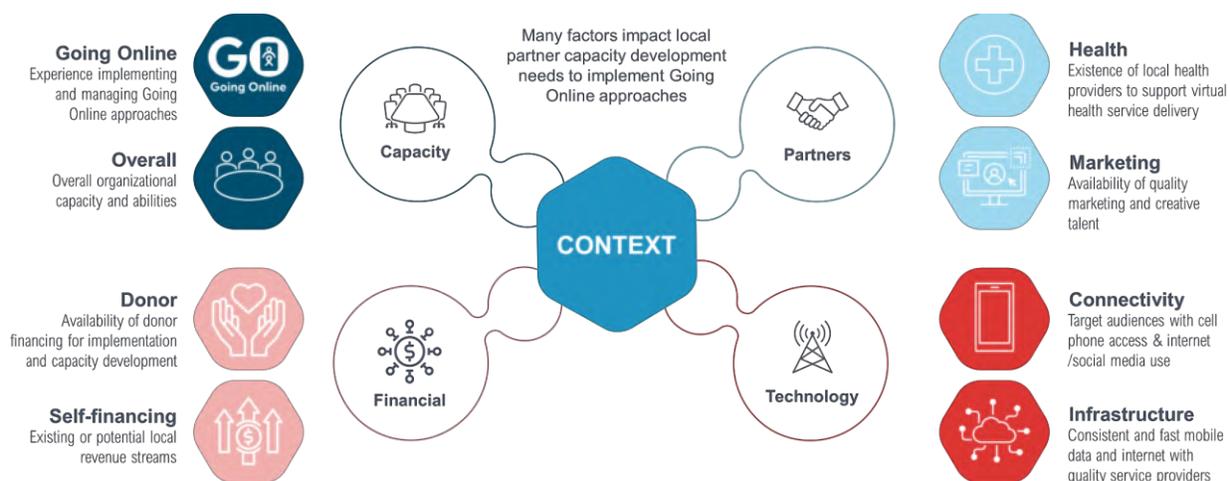
Approach

FHI 360's approach to capacity development aligns with locally-led development goals put forth by donors such as USAID and the Global Fund. Capacity of local partners are developed using practical experience of implementing virtual health service delivery (implementation package), as well as activities that effectively transfer skills and abilities for local partners to manage these approaches on their own (capacity development package). Our approaches are applicable to both subpartners implementing FHI 360 programming and other partners who see value in Going Online to enhance their current programming (see success stories).

Over time, these capacity development packages allow local partners to take greater ownership and management responsibility for their virtual health service delivery and require less intensive implementation support from FHI 360. As capacities are developed, the focus will shift from technical and analytical/learning capabilities for implementing virtual health service delivery, to organizational, growth, and relational capabilities. Find illustrative examples of the types of capacity development support in *Figure 2* and description of the five capacity development domains in the footnote.[1]

FIGURE 2. IMPLEMENTATION AND CAPACITY DEVELOPMENT SUPPORT PACKAGES

IMPLEMENTATION PACKAGE · LOCAL PARTNER CAPACITY · CAPACITY DEVELOPMENT PACKAGE

Top-up
Technical assistance to support local partners to innovate and refine their self-managed Going Online approaches

Complementary
Technical assistance for local partners to introduce new, or scale existing, Going Online approaches which may be partially self-managed

Wrap-around
Technical assistance to support local partners to introduce Going Online approaches and provide management, operations, and performance support

Higher Capacity
Medium Capacity
Lower Capacity

Advanced ■ RELATIONAL ■ GROWTH
- Support local partners to develop their ability to document and share their Going Online approaches and assist lower capacity partners
- Develop ability to identify and pursue and secure financial support to sustain Going Online approaches

Basic ■ ORGANIZATIONAL ■ TECHNICAL ■ LEARNING
- Support local partners' ability to self-manage Going Online approaches including required operational, human resources, and financial management
- Support technical and learning capacity development for added Going Online approaches

Introductory ■ TECHNICAL ■ LEARNING
- Introduce Going Online technical approaches and transfer skills to local partners for their adaptation and implementation
- Introduce approaches and transfer skills to local partners to understand outcomes of Going Online approaches, use data, and improve performance

[1] The five domains of capacity development include: ■ Technical capability to implement programming that is contextually appropriate, responsive to the needs of the community, aligned with donor priorities and expectations, and consistent with relevant standards of care. ■ Learning ability to analyze and interpret data about programming, use data to adapt and improve performance, and report to donors and stakeholders on the outcomes and impacts of programming. ■ Organizational capacity to effectively manage the institution's resources (e.g., human, financial, assets), the management structures supporting operations, and the overall governance of the institution. ■ Relational ability to work with other actors (e.g., stakeholders, health systems, funders) in both formal and informal ways toward common goals and to lead and serve as a resource within the community on areas of expertise. ■ Growth capacity to expand geographically and financially into new service areas and to diversity the institution's sources of funding and other resources.

Detailed Menu of Technical Assistance

FHI 360's menu of technical assistance spans six areas, including program planning, outreach/marketing, service delivery, client engagement, data use for performance improvement, and dedicated capacity development activities to increase local partner ownership and management of virtual health interventions (Figure 3). The Going Online team has experience tailoring and implementing these approaches for HIV (Figure 4) as well as broader sexual and reproductive health, mental health, and COVID-19 related services.

PLAN

Technical assistance to understand and engage online target audiences and plan for virtual health service delivery:

- Collect data to plan online marketing to create demand for health services (e.g., online audience size estimation, quick online surveys to learn from target audiences, social media mapping, and online audience segmentation)

- Facilitate stakeholder and community engagement and input in virtual health service delivery strategies (such as convening community advisory groups representing online target audiences)

- Establish new partnerships to support virtual health service delivery such as with marketing or creative agencies, private health providers/services, and/or specialized technical support

- Develop or provide technical input on virtual health service delivery strategies and plans

- Support procurement and setup of technologies, devices, applications, and services for virtual health service delivery

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FIGURE 3. MENU OF TECHNICAL ASSISTANCE FOR VIRTUAL HEALTH INTERVENTIONS

Plan
Understand and engage online target audiences and plan for virtual health service delivery

Reach
Generate demand for health services and reach new audiences online

Deliver
Provide health services using remote and virtual channels (telehealth)

Engage
Follow-up and re-engage clients over time

Improve
Collect and use data to improve performance of virtual health interventions

Capacitate
Increase local partner capacity to own and manage virtual health interventions

Technical assistance for implementation and capacity development support...

increases local ownership and management of virtual health interventions.

REACH

Technical assistance to generate demand for health services and reach new target audiences online:

- Design, manage, and support online marketing campaigns including managing creative and marketing agency support, running paid online ad campaigns, and managing influencer promotions

- Establish, supervise, and support teams of virtual/online outreach staff

- Design and manage online/virtual client-driven recruitment or referral strategies

DELIVER

Technical assistance to provide health services using remote and virtual channels (telehealth):

- Support rollout of client-to-provider virtual consultations (telemedicine) using tools, apps, and country/program-specific procedures

- Support rollout of decentralized drug distribution of medicines using virtual referral and tracking platforms (including pharmacy pick-up)

- Support rollout of diagnostic/lab referrals using virtual referral and tracking platforms

ENGAGE

Technical assistance to follow-up and re-engage clients over time:

- Design, manage, and support teams of virtual case managers who follow up with clients and support the management of their care

- Improve virtual communication skills of clinicians, counselors, or other client support staff using motivational counseling techniques and streamlined tools and procedures

- Establish and manage tools for virtual contact tracing for infectious diseases

- Design and rollout of SMS messaging campaigns and/or chatbots for routine engagement of clients

IMPROVE

Technical assistance to collect and use data to improve performance of virtual health interventions:

- Adapt and use client-facing applications to request or schedule appointments for health services and manage service delivery to clients using ORA (see box at right).

THE ONLINE RESERVATION AND CASE MANAGEMENT APP (ORA)

FHI 360 developed ORA in 2017 with USAID funding. ORA is currently used in 34 countries across the Caribbean, Africa, and Asia to support client self-care and telehealth service delivery.

Learn more about ORA and its available functions in this technical guide
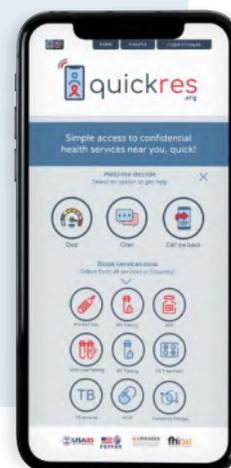
- Collect and use client feedback and complaints to improve the quality of health services

- Support performance monitoring and evaluation of virtual health interventions, including regular data review and iterative course correction

- Document and share knowledge of virtual health service delivery approaches

- Support data collection and analysis to generate a body of evidence about virtual health interventions

CAPACITATE

Technical assistance to increase local partner capacity to own and manage virtual health interventions:

- Convene webinars and training on technical approaches

- Create documentation on technical approaches (e.g., procedures, guides, and job aids)

- Provide supportive supervision and performance improvement for implementation of technical approaches

- Support transition planning, including documentation of managerial procedures for virtual health interventions and transferring ownership of accounts, applications, and routine vendor payments

- Provide targeted organizational capacity development support to local partners to manage and sustain virtual health interventions (e.g., finance, procurement, and human resource capacity development)

FIGURE 4. TECHNICAL APPROACHECS TAILORED FOR VIRTUAL HIV INTERVENTIONS
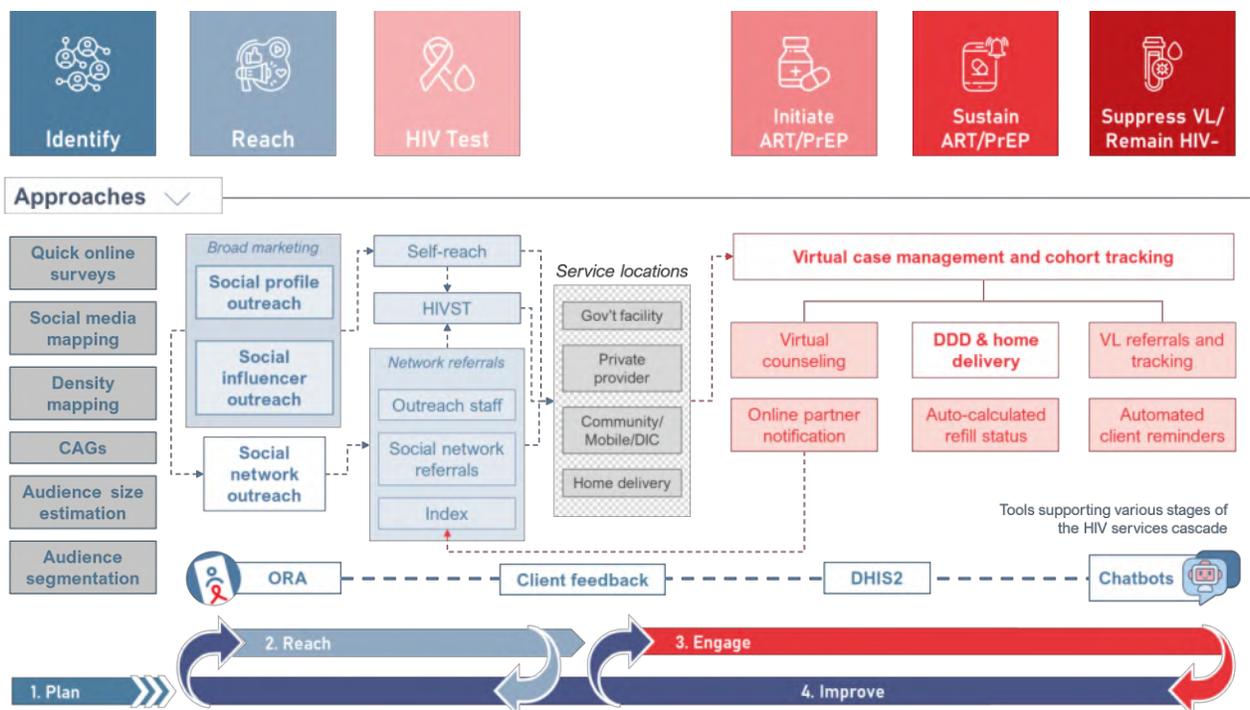
Success Stories

FHI 360's Going Online team supports health programs across more than 35 countries to plan, implement, and manage virtual health service delivery. Many of these countries receive technical assistance from FHI 360 to implement the Online Reservation and Case Management App (ORA) as shown by the countries highlighted in blue in Figure 5. Several of these programs also receive capacity development support for online outreach, marketing, virtual case management, and client feedback systems (called LINK), among other approaches. See several success stories of FHI 360-supported Going Online efforts in the following sections.

Legend:
- ORA (planning in light blue)
- TA for Going Online
- TA to Global Fund partners

LINK implemented in: Cambodia (adapted), Cote d'Ivoire, Jamaica, Kenya, Liberia, Mali, Nepal, Thailand, and Vietnam (adapted)
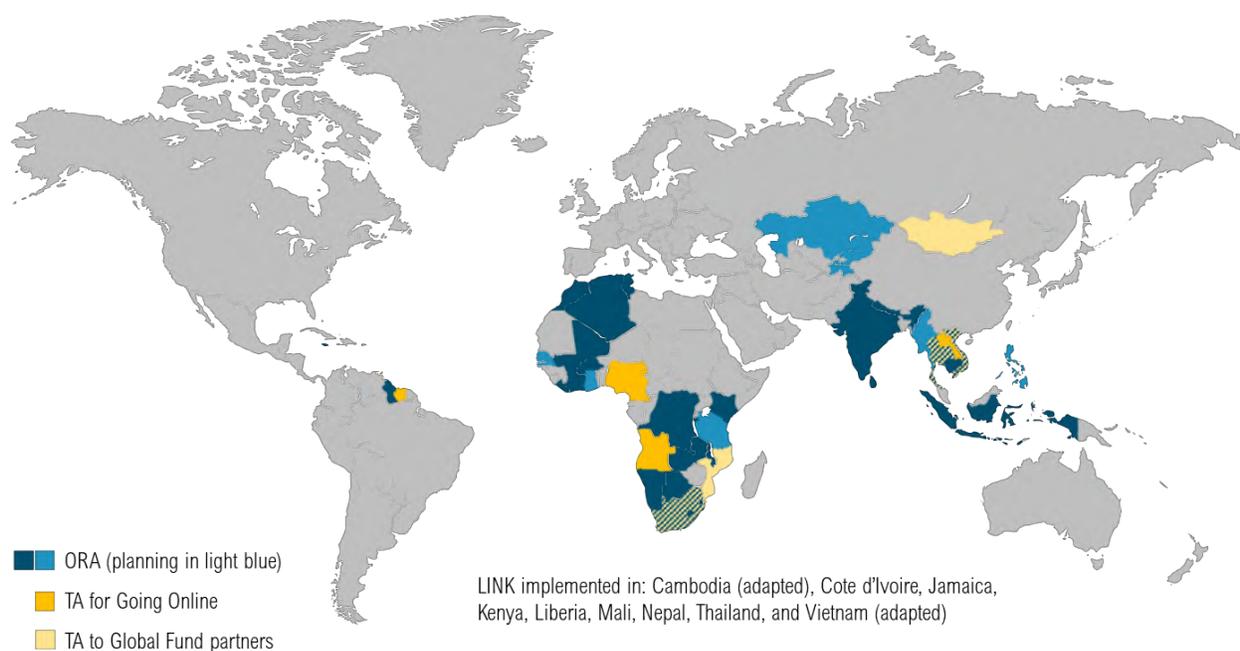
GLOBAL | FACEBOOK COVID-19 VACCINATION CAMPAIGNS

FHI 360 staff including Going Online support staff participated in the Facebook for Health Social Behavior Change Communications (SBCC) Program between August and September 2021. This program supports health partners across the globe as they promote COVID-19 prevention behaviors and vaccination confidence campaigns in the countries where they work. The Going Online backstops supported local partners in Papua New Guinea, Indonesia, Cambodia, Nepal, Thailand, Central Asia, Botswana, and Tanzania to plan a COVID-19 campaign and use the Facebook Ad Manager to target and coordinate campaigns. Partners also benefited from live workshops with training and peer-learning components, an online learning platform with recorded pre-watch resources, Facebook ad credits, and creative templates.

JAMAICA | ONLINE OUTREACH AND SOCIAL MEDIA MANAGEMENT

In 2017, the Linkages across the Continuum of HIV Services for Key Populations Affected by HIV (LINKAGES) project in Jamaica funded by USAID through the U.S. President's Emergency Plan for AIDS Relief (PEPFAR), built the capacity of local partners Children First and Ashe to identify at-risk men online and link them to HIV services available within their network of providers. The technical assistance provided by FHI 360 included training, routine coaching, developing client management resources and standard operating procedures. By

TABS social media content editors. Credit iFLEX (2019)

the end of 2019, FHI 360 had transitioned management of the campaigns TABS and iFLEX directly to the local partners who coordinate their own online outreach and social media content. Continuing on this experience, the Meeting Targets and Maintaining Epidemic Control (EpiC) project provided capacity development support to the USAID direct-funded local partner Jamaica AIDS Support for Life (JASL). FHI 360 supported JASL to design and launch their own ORA, called MyHealthJA, which empowers clients to assess their HIV and sexually transmitted infection (STI) service needs and book appointments. It also acts as a tool for outreach workers to schedule and follow up on arrangements for services like STI screening and HIV testing. MyHealthJA is now managed by JASL, who continue to provide support to the two partners and receive their referrals for clinical services including antiretroviral therapy (ART). Ashe and Children First continue to leverage the technical assistance provided by FHI 360 to re-strategize and reinvigorate their campaigns, making them good resources for other organizations in the Caribbean and worldwide.

Online outreach worker of iFLEX, Jamaica. Credit iFLEX (2019)

NAMIBIA | VIRTUAL CASE MANAGEMENT FOR ART AND PREP

As part of the EpiC project, FHI 360 supported USAID local partner IntraHealth Namibia (IHN) to adapt QuickRes for virtual case management. The package of technical assistance provided to IHN included a series of trainings for case managers and their supervisors. It also included coaching to IHN to provide supervision to their implementing partners, such as the Walvis Bay Corridor Group (WBCG) and civil society organizations Rights Not Rescue Trust (RnRT), Wings to Transcend-Namibia (WTTN), Voice of Hope Trust (VHT), and MPower

Case manager uses QuickRes to track cohort of clients on ART and PrEP. Credit: KP-STAR Project Namibia (2021)

Community Trust. IHN now has the capacity to manage their own service contracts and give supportive supervision to their partners with periodic townhalls and consultations. By the end of August 2021, 7,186 appointments were managed using QuickRes, with 72.2 percent of clients arriving for their services — making the partners in Namibia super users among the other programs around the world. Since October 2020, 1,974 clients on ART and pre-exposure prophylaxis (PrEP) (31% on ART) have been added to QuickRes for virtual case management in Namibia. For these clients, a total of 1,757 refill appointments were also administered using QuickRes (55% of appointments were for ART).

Case manager demonstrates to client how to book appointments on QuickRes. Credit: KP-STAR Project Namibia (2021)