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Local Health System Sustainability Project

Toolkit for Sustainable Health System Strengthening

Local Health System Sustainability Project

The Local Health System Sustainability Project (LHSS) under the USAID Integrated Health Systems IDIQ helps low- and middle-income countries transition to sustainable, self-financed health systems as a means to support access to universal health coverage. The project works with partner countries and local stakeholders to reduce financial barriers to care and treatment, ensure equitable access to essential health services for all people, and improve the quality of health services. Led by Abt Global, the five-year project will build local capacity to sustain strong health system performance, supporting countries on their journey to self-reliance and prosperity.

Acronyms

CAM   Complexity Aware Monitoring

CLA   Collaborating, Learning, and Adapting

HSS   Health System Strengthening

LHSS   Local Health System Sustainability Project

MEL   Monitoring, Evaluation, and Learning

PEA   Political Economy Analysis

PEPFAR   U.S. President's Emergency Plan for AIDS Relief

PFM   Public Financial Management

TWP   Thinking and Working Politically

USAID   United States Agency for International Development

Contents

What is the Toolkit for Sustainable Health System Strengthening?

Use this toolkit to:

- Gain insight into the range of tools for designing, planning, implementing, monitoring, evaluating and adapting, programs that lead to sustainable health system performance improvements.

- Understand when, why, and how to use recommended tools for health system strengthening investments.

The Toolkit for Sustainable Health System Strengthening compiles fit-for-purpose resources that development partners and implementers can use to support sustainable health system performance improvements rather than short-lived outputs or changes.

What's in the toolkit?

The toolkit is organized around the program cycle (Figure 1) to help users design, plan, implement, monitor, evaluate, and adapt health system strengthening (HSS) investments that lead to sustainable health system performance improvements.

As USAID emphasizes, the program cycle is an integrated and iterative process that enhances the effectiveness and sustainability of development interventions through continuous learning and adaptation.[1] As such, most tools are applicable across the program cycle. For example, tools listed under the 'co-assess' stage can also be effectively used during 'support local implementation' or 'co-create solutions'.

Selected tools provide guidance for donors and implementing partners to apply systems thinking approaches to support localized and contextual solutions owned and driven by local actors. Systems thinking enables development partners and implementers to understand and influence context-specific factors, relationships, and interactions within the heath system that are important for driving and sustaining health system performance improvements.
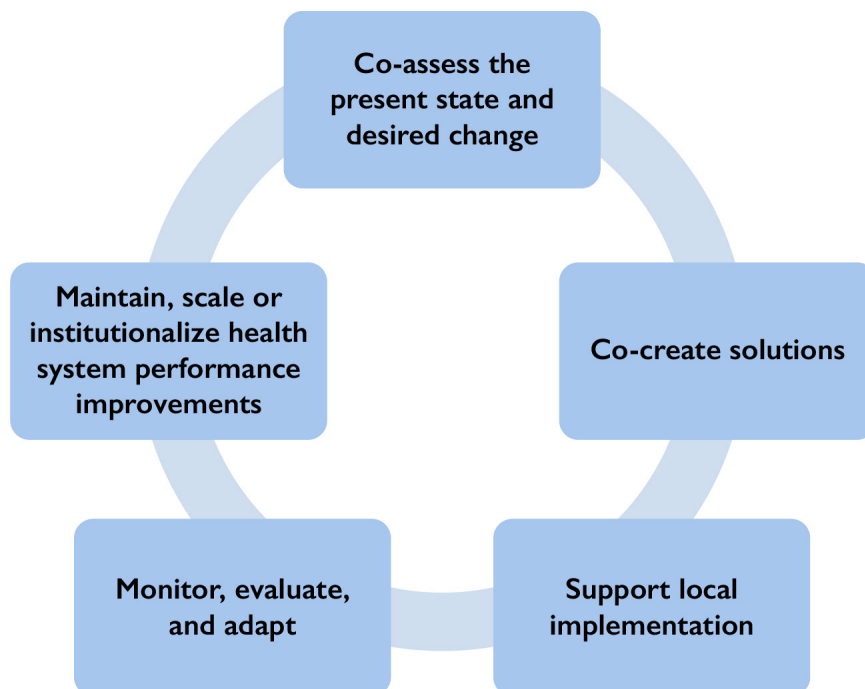
> A **health system performance improvement** is a positive change in the functioning of the overall health system, or a specific part, that contributes to improved ability of the system to achieve national goals.
>
> A **sustainable health system performance improvement** can be continued, scaled-up, or institutionalized by local actors.
>
> **Local actors** include public and private sector organizations, government entities, private for-profit companies, non-profit organizations, civil society organizations (CSOs), non-governmental organizations (NGOs), faith-based organizations, networks or associations, and communities.
>
> **Systems thinking** is an analytic approach that seeks to understand how systems behave, interact with their environments, and influence each other leading to particular outcomes (USAID, n.d.).

Figure 1: Approach to supporting sustainable health system performance improvements

Source: Modified from the LHSS Strategy for Sustainable Health System Strengthening

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[1] https://www.usaid.gov/project-starter/program-cycle#:~:text=The%20Program%20Cycle%20is%20the,of%20approaches%20to%20achieve%20results.

How can you use this toolkit?

The toolkit provides links to each recommended tool along with a brief description of its content and a tip on how it can be used most effectively. The icons described below may help guide users in choosing tools to explore further.

	Informational resource providing high-level guidance rather than step-by-step instructions.
	Compilation of tools and guidance addressing a specific issue or theme.
	Worksheet, workbook, or detailed instructional resource.
	Can be used quickly and requires minimal resources (time, funding, and/or people) for implementation.
	Requires significant resources (time, funding, and/or people) for implementation.
	Easily adaptable for varied country contexts.

1. Co-assess the present state and desired change

Supporting donor investments that lead to sustainable health system performance improvements begins by engaging local actors to understand what they would like to change in the health system. Development partners, implementers, and local partners can then apply systems thinking to develop a shared understanding of what is needed to make that change, and how donors or implementers can support local actors to make that change.

How do I effectively identify and understand the right stakeholders?

If you are new to stakeholder mapping and short on time…
Stakeholder Mapping Guide (World Health Organization, n.d.) is a simple, easy-to-use tool to identify stakeholders and understand their perspectives. Although focused on reproductive health and family planning, it can be adapted to other health areas. 💡 *This tool is a good starting point for identifying stakeholders to engage for more in-depth, collaborative assessments described in subsequent sections.*

If you are unfamiliar with the context…
Stakeholder and Social Network Analysis (International Rescue Committee, 2019) helps users identify the actors and relationships that influence project outcomes. It guides users to choose and conduct a basic or a social network analysis to determine how to engage with local partners to achieve the outcomes. Implementing this guidance requires organizing a 1-3 hour meeting or workshop. 💡 *This tool is not health specific and will be most useful with preparatory work to identify health system stakeholders and information sources.*
Stakeholder Analysis Guidelines (Schmeer, 2001) walks users through a systematic process for collecting and analyzing data about key health reform stakeholders, with a focus on objectively analyzing findings. 💡 *While intended for health policy projects, practical recommendations on adapting interview tools and data collection methods are relevant for other health areas.*

If you want to understand your own influence as a donor…
Collaboration Mapping (USAID, 2018) explains how to map and visualize relationships with key stakeholders to inform efforts to strengthen your organization's relationship with others and help determine your level of influence. 💡 *This exercise is most useful for organizations with an established presence in a given sector or geography. It is also a useful tool to clarify donor perspectives in relationship management.*

If you need to analyze a complex sector…	
	Thinking and Working Politically through Applied PEA (USAID, 2018) provides guidance on executing a political economy analysis--a structured approach to examining power dynamics and economic and social forces that influence development. The PEA is designed to be applicable across sectors and levels, and while it is not health specific, has been used successfully many times to examine challenges in health systems. It includes core resource documents to identify the level of analysis required, questions for proper analysis, an overview of the PEA process, and an overarching framework.
	A full PEA is resource intensive, but this provides valuable guidance on how thinking and working politically can be achieved at smaller scale throughout program implementation.
If you are engaging marginalized groups…	
	Safety/Security-Sensitive and Trauma-Informed Stakeholder Consultations with Members of Marginalized Groups (DDI/Inclusive Development Hub, 2022) is a four-page guide outlining responsible practices for setting up and conducting consultations with individuals and organizations of marginalized groups.
	This is a valuable, short read with practical recommendations—including how to email, where to hold consultations, and how to respond if a stakeholder becomes distressed—that can be easily incorporated to maximize inclusivity.

How can I use systems thinking to contribute to sustainable health system performance improvements?

If you are new to systems thinking…	
	Systems Mapping: Unpacking Complexity and Identifying Opportunity for Change (Results for Development, 2022) is a short video that outlines types of systems mapping and how visualization tools, such as maps, can be used to help understand complex systems.
	This is a good introduction for users who are new to systems thinking.
	Systems Thinking and Practice: A Guide to Concepts, Principles and Tools for FCDO and Partners (Institute of Development Studies, 2023) provides an in-depth explanation of the benefits and core aspects of systems thinking and practice to improve the outcomes of development programs. It highlights how organizations can apply systems thinking and practice to: view situations holistically; bring multiple perspectives to the table; consider alternative future scenarios; strengthen networks, feedback, and relationships; design interventions around system dynamics; experiment valuing failure and learning; and manage adaptively. It is not specific to health but can be used effectively given its focus on systems writ large and in different country contexts as well as links to additional resources and tools.
	While it does not guide you through practical exercises, this resource has several examples of diagrams, visualizations, and analyses that may inspire your own systems thinking.

	The 5Rs Framework in the Project Cycle (USAID, 2016) explains how systems practice can be embedded into programming through applying results, roles, relationships, rules, and resources.
	💡 *This builds on USAID's Local Systems Framework (below); consider reading that first to get the most out of this resource.*

If you want to focus on systems thinking to support local implementation…

	Local Systems: A Framework for Supporting Sustained Development (USAID, 2014) introduces systems thinking and how it improves the way we think about sustainability. It proposes principles to guide engagement with local health systems but does not get into details or instructions on how to apply these principles.
	💡 *This document is best used alongside The 5Rs Framework in the Project Cycle (above) and the Local Systems Position Paper (below) to comprehensively understand USAID's approach to systems thinking and practice.*
	Local Systems Position Paper (USAID, 2024) builds on the Local Systems Framework by explaining how USAID encourages the use of systems practice, both internally and by its implementing partners, to contribute to locally led, sustainable progress.
	💡 *In addition to reviewing systems practice, this resource is also helpful in underscoring the link between sustainability and program quality, and the need to consider sustainability from the outset.*

If you want a health sector example…

	Systems Thinking and Action for Nutrition (SPRING, 2015) walks through an application of systems thinking that illustrates how systems practice enhances a cross-sector approach and inclusion of feedback loops in project implementation.
	💡 *This resource walks through the application of USAID's 10 principles on systems thinking to a specific health program.*

How can I assess the present state of health systems?

	If you are new to health system assessments or are seeking a framework to guide thinking and implementation…
	Health System Performance Assessment: A Framework for Policy Analysis (World Health Organization, 2022) synthesizes seven seminal health system assessment tools. Users will better understand the scope of the health system and have a guide outlining requirements for assessing particular components of the health system. *The included assessment tools diverge in their guidance on whether and how to incorporate social determinants of health, the degree of person-centeredness, and their level of prescriptiveness.*
	Health Systems Assessment Approach v3.0 Rapid Assessment Tool (Health Finance and Governance Project, n.d.) provides detailed instructions on how to conduct a formal and comprehensive health system assessment. It explains the HSA approach, outlines the resources and processes required, and methodically guides the user through design, data collection, analysis, and recommendations. Completing the HSA results in in-depth understanding of how well the health system is performing and actionable, specific recommendations that reflect local priorities. *This assessment takes several months if completed in full. You can use the tool to shape and conduct a more focused assessment aligned with selected system areas, available resources, and stakeholder priorities.*

How can I engage local partners to create and keep a vision of the desired change?

Visioning plays a crucial role in linking donor investments to desired health system performance improvements, helping stakeholders to clearly define and maintain a focus on HSS goals rather than on donor-funded activities. The following list highlights specific visioning elements within the resources described in various sections of this toolkit that will help users identify and prioritize sustainable performance improvements.

- **Stakeholder and Social Network Analysis** includes a short exercise to define desired outcomes and walks users through an exercise to determine how selected actors can help to achieve or block that outcome.

- **5Rs Framework in the Project Cycle** includes an activity to examine the local health system around a desired result (focal result of interest). Validating results with local stakeholders and system actors may result in reframing the desired result.

- **Systems Practice** workbook walks the user through identifying a guiding star--a vision of the desired future system that will serve as a long-term navigational tool to guide program implementation and adaptation.

- Step 3 of the **Theory of Change Workbook: A Step-by-Step Process for Developing or Strengthening Theories of Change** focuses on articulating a desired future state with guiding questions to ensure outcomes are high quality.

- **Locally Led Development Checklist Facilitation Guide** asks users to consider what program success looks like, and how bringing local leadership into your program influences the vision of success.

- **Bringing The Future Into Focus: A Step-by-Step Sustainability Planning Workbook** recommends revisiting desired program outcomes at the start of sustainability planning to reflect on what has been accomplished and why.

- **Guide for Developing Sustainability and Transition Plans. Version 2.0** reiterates the importance of developing a shared vision that includes short-term and long-term priorities of stakeholders about what should be sustained.

2. Co-create solutions

This step builds on an understanding of what local actors seek to change and achieve, to agree on technically appropriate, feasible solutions that can contribute to sustainable health system performance improvements.

How can I foster effective thinking about solutions to move from a problem to desired results?

If you want support to develop and adapt a theory of change…	
	Thinking Big: How to Use Theory of Change for Systems Change (Abercrombie, Boswell, & Thomasoo, 2018) provides five rules to apply when creating a theory of change. Users will learn when and how to build pauses into the process of developing a theory of change, to enable consideration of how best to become effective agents of systems change. 💡 *Emphasizes theory of change as a tool for reflection and adaptation.*
	Theory of Change Workbook: A Step-by-Step Process for Developing or Strengthening Theories of Change (USAID, 2022) is a workbook that walks through four key elements of a strong theory of change: outcomes, entry points, interventions, and assumptions. After completing this workbook, users will have a better perspective of how donor investments will contribute to improved health system outcomes. 💡 *Complete this exercise jointly with stakeholders identified in the "co-assess" stage for best results.*
If your focus is on shifting from evidence to action…	
	Problem Driven Iterative Adaptation Toolkit (Harvard Kennedy School, 2018) is designed to build the capacity of organizations implementing development policies and programs. It builds on many systems thinking tools with added elements on examining authority, how to generate solutioning ideas, and leaning into experiential learning throughout the program cycle. It contains links to several other resources. 💡 *This robust resource is useful for strengthening the capacity of program managers to propose and implement solutions to complex problems. It aligns closely with USAID values and principles.*
	Systems Practice workbook (The Omidyar Group, 2022) helps users move from theory to practice with several activities that can support the user throughout the program cycle. 💡 *There is a lot in here! Start at the table of contents where activities are organized by program cycle and select the phase most relevant to your program.*

How can I foster effective thinking about solutions to move from a problem to desired results?

If you want to co-create with local partners…	
	Co-Creation Guidance (USAID, 2020) provides guidance, videos, and examples that walk through the process of determining whether co-creation is appropriate for you, managing the co-creation process, and setting up feedback loops after your co-creation event is completed. While it is not specific to health, the tool is highly adaptable, and there is one global health example in the 'Listen and Learn' section. 💡 *This tool Is most relevant for program design and planning, but it can be used throughout the program cycle. Pause and reflect sessions are an example of how co-creation might be used as a monitoring tool to review progress regularly.*
If you want to build mutuality and effective partnerships into your program…	
	Locally Led Development Spectrum and Checklist Tool (USAID, 2021) includes a short facilitation guide, an internal worksheet, and two country examples of locally led development. By the end, users will have a baseline understanding of the extent to which a program is locally led, and ideas for advancing local elements. 💡 *This tool is designed to take no more than 1-2 hours to complete. While not specific to the health sector, the worksheet can be modified to increase relevance.*
	Strategy for Sustainable Health System Strengthening (LHSS, 2023) shares thinking on how to integrate localization and mutuality into programming. It walks through the use of sustainability and transition plans, grants under contract, transition awards, and engagement with non-traditional partners. By the end, users will understand how local engagement evolves throughout the program cycle and technical and operational mechanisms that are available to cultivate a collaborative environment. 💡 *This resource focuses more on localization principles and approaches rather than explicit instructions for how to operationalize these.*
If you want to maximize community engagement…	
	Empower to Enable (E2E) Toolkit (International Rescue Committee, 2024) enhances community participation and empowers frontline staff to adapt programs based on community feedback, leading to more effective humanitarian action. 💡 *While this toolkit is intended for humanitarian responses and those working on or near the frontlines, it can spark inspiration for ways to increase community engagement in HSS programming.*

3. Support local implementation

Achieving and sustaining health system performance improvements requires local actors to take ownership and lead implementation of localized solutions. In many cases, local actors may initially need technical assistance and/or capacity strengthening support that can be reduced as partners' capacity and/or system functioning is strengthened. The below tools can be used to support tailored capacity strengthening at the individual, organization, network, and system levels to facilitate local implementation of HSS activities co-developed with local actors.

How do I support local partners as they assess and strengthen their capacity to sustain health system performance improvements?

If you want to learn how to pick a tool best fit for purpose…

Hewlett Foundation's A Guide to Organizational Capacity Assessment Tools (Informing Change, 2017) gives an overview of the organizational assessment process and outlines how assessment characteristics influence the type of tool that will work best (e.g., a broad or narrow capacity focus, the size of your budget, and the type of organization undergoing the assessment). After reading this, users will have a sense of what capacity assessment tools exist and which of these may be best suited to project needs.

This resource was published in 2017 and its database does not include tools published since then. However, it is still useful in understanding the breadth of organizational assessments and how to select the best tool.

Guide to Distinguishing Tools Used for Local Capacity Strengthening (USAID, 2022) groups tools into one of three purposes: performance measurement, capacity action planning, and risk mitigation. It outlines the characteristics each type of tool should exhibit to be effective.

This is a straightforward resource that is particularly useful if you have a tool in mind but are unsure if it will suit your program need.

If you want a tried-and-true assessment tool…

Organizational Capacity Assessment (USAID, 2016) tool is a seminal resource that instructs organizations on how to conduct a self-assessment of seven capacity areas covering governance, financial management, human resources, program management, and others. It comes in two versions: a basic version and a version with a facilitator's guide.

USAID "recommends its use by local organizations with direct or indirect awards soon after the award and once or twice more during the award period". It can be adapted for purposes other than USAID awards.

	If you want to develop clear action plans with your local partners to monitor progress…
🧰🕐💲👤	[**Performance Mapping and Improvement System**](#) (MOMENTUM, 2024) is a suite of tools to support local organizations and program implementers in identifying performance improvement needs. The current and robust tool goes beyond assessment to help investigate why and how organizational change occurs and provides guidance on performance management. It provides users with a clear framework for organizational performance, including 100-day plans for monitoring. 💡 *Rather than focusing on capacity strengthening, as many other tools do, PERFORM focuses on performance management and self-directed performance improvement. This aligns well with USAID's CBLD-9 indicator.*
📘⚡	[**Monitoring Organizational Capacity Development Efforts**](#) (USAID, 2021) focuses less on the assessment itself and more on how to monitor organizations' capacities as organizations strive to improve them. 💡 *This is one of the few resources that addresses monitoring government organization performance and its unique nuances.*
📘	[**Implementation Guide: Strategy for Sustainable Health Systems Strengthening**](#) (LHSS, 2023) reviews how to co-assess capacity with local partners. The annexes include examples of organizational capacity strengthening assessments, intervention plans to turn those assessments into action, and sustainability and transition plans supporting mutual accountability and planning for capacities to be sustained and/or taken to scale after the life of the project. 💡 *This resource has a useful, short section on how grants under contract can be used to promote localization and strengthen local stakeholder capacity.*

4. Monitor, evaluate, and adapt

Engaging local partners to co-facilitate routine performance monitoring, learning, and adaptation throughout the implementation cycle is important for maintaining a continuous focus on sustainable performance improvements. This includes reviewing interventions and strategies against intended results to identify needed adjustments; sharing learning from successful interventions and strategies that should be documented, adapted, and scaled up; and identifying changes in context that may require modifying the implementation process.

How do I work with local partners to monitor, evaluate, learn, and adapt programs to contribute to sustainable health system performance improvements?

If you are new to project monitoring in complex environments…
Collaborating, Learning, and Adapting (CLA) Toolkit (USAID, n.d.) is an invaluable repository of over 60 resources that are relevant throughout the program cycle, including case studies, how-to guides, self-assessments, and podcasts organized across themes including learning, processes, and insights. This toolkit contains dedicated resources on how to improve organizational or team culture.   *Consider starting in the "Understanding CLA" theme and reviewing 'Pathways to Integrating CLA in Your Work'.*
Discussion Note: Complexity-Aware Monitoring (CAM) (PLR's Office of Learning, Evaluation and Research, 2021) is a nine-page brief introducing the concept of CAM and how to monitor project performance in dynamic contexts where cause-effect relationships are uncertain. After reading this, users will understand when to use CAM, and how it can be used to complement performance and context monitoring.   *This is a great introduction but does not provide detailed instructions on how to conduct specific monitoring exercises. It provides useful graphics and additional resources to support implementation.*

	If you want to learn about MEL in the health system strengthening context…
	Health System Strengthening Practice Spotlight on Contribution Analysis (LHSS, 2022) walks through using the six steps of contribution analysis to understand why observed changes occurred, and parse out external factors from program intervention. Reading this will help users determine whether contribution analysis is well-suited for a program and, if so, how to plan and execute it in a way that makes the best use of resources. 💡 *Contribution analysis is best suited for situations when change is non-linear and/or the reasons for change are difficult to identify, as is usually the case with HSS.*
	Health Systems Strengthening – Monitoring, Evaluation, and Learning Guide (MEASURE Evaluation, 2017) provides in-depth instructions on planning, implementing, and evaluating an HSS project. It focuses on building capacity to effectively plan and execute program monitoring, comprehensively guiding the user through each stage of the program cycle. 💡 *Each chapter "starts with a scenario to encourage readers to think about the steps to take before starting a description of the steps generally needed on that topic".*
	Framework and Guideline for the Assessment and Evaluation of Health Systems Strengthening Programs (USAID, 2012) provides a standard methodology to evaluate a program's influence on health and health systems outcomes, the system-wide effect of the program, and the program's relevance in a country. 💡 *This resource is evaluative, scoring the entity across performance categories. It can also be used to evaluate the capacity of local partners to implement programs.*
	If you want to learn about practical steps you can take to measure HSS outcomes…
	Health System Strengthening Learning Agenda (USAID, n.d.) lists learning questions on how to apply systems practice to HSS interventions. It serves as a platform through which USAID staff share continuous learning and adaptations. 💡 *Consider including these questions in your work plan, quarterly reports, and/or pause and reflect meetings.*
	Monitoring Toolkit (USAID, n.d.) is a centralized space for resources on monitoring approaches, indicators, data, and reporting. 💡 *This includes explicit instructions for several steps in monitoring, such as conducting site visits, selecting performance indicators, and integrating gender into performance plans and reports.*
	Evaluation Toolkit (USAID, n.d.) includes guidance and templates for planning and conducting program evaluations. 💡 *Although USAID focused, the principles and processes are widely applicable and easy to adapt for other program evaluation purposes.*

5. Maintain, scale, or institutionalize health system performance improvements

As implementation of donor investments progresses, donor partners and implementers should continue to engage local actors to identify health system performance improvements and to plan for how to sustain (maintain, institutionalize, or scale) those performance improvements.

How do I identify the performance improvement to be sustained?

If you prefer instructional guides…

Bringing The Future Into Focus: A Step-by-Step Sustainability Planning Workbook (Georgia Health Policy Center, 2011) walks users through a process to clarify the long-term impacts of a program and the resources needed to sustain those impacts, and to determine which program activities should continue beyond donor funding. After finishing this, the user will have a sustainability plan.

This valuable resource unpacks sustainability comprehensively and discusses sustainability planning dynamics that occur in a consortium. As this guide is 15 years old, it focuses more on sustaining program activities than sustaining outcomes (health system performance improvements). However, the process and questions are useful for guiding thinking about sustainability even if a sustainability plan is not desired.

If you want to start with a theoretical framework…

Dynamic Sustainability Framework (Chambers, Glasgow, & Stange, 2013) provides a way to consider sustainability theory and concepts under the assumption of constant change and program iteration that reflects the broader country context.

This resource is a good complement to USAID's CLA approach as it provides an alternative perspective to the same principles of ongoing learning, adaptive management, and joint programming.

If you are visually inclined…

Field Guide to Ripple Effects Mapping (Chazdon, Emery, Hansen, Higgins, & Sero, 2017) provides guidance on a participatory data collection method designed to capture the impact of complex programs and collaborative processes in a map. Completing this mapping will provide a visual diagram of intended and unintended program impacts. This is useful for identifying health system performance improvements.

Be thoughtful about who you include in the mind mapping session; consider completing a stakeholder analysis first to ensure appropriate actors are present.

How do I work with local partners to identify actions to sustain health system performance improvements?

If you are seeking to understand how to sustain a performance improvement…	
	Health System Strengthening Practice Spotlight on Outcome Harvesting (LHSS, 2022) describes a participatory M&E approach that can be conducted during implementation, or as part of a final evaluation, to understand the factors that have contributed to identified outcomes. The findings from an outcome harvesting process can help identify actions that can be taken to sustain health system performance improvements. *This approach is most useful when both anticipated and unanticipated outcomes are included. The tool provides real world applications of outcome harvesting, including for complex health programs and examples of how findings have been used.*
If you are looking to scale as well as sustain…	
	The Implementation Mapping Tool: A Tool to Support Adaptive Management and Documentation of Scale Up (Expand Net, 2020) is a participatory tool that guides a small group to reflect on how an intervention could be adapted to improve its relevance and provides corrective action and documentation as part of the process of scaling up or planning for scale-up of interventions. *This is one of few tools that focuses exclusively on scale-up.*

Additional resources

	Strengthening Evidence Gap Map - Sustainability And Scale Up (LHSS, n.d.) is a live repository of publicly available resources relevant to sustainability and scale up of HSS interventions.

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