TB Prevalence Survey
Budgeting
&
Procurement

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Budgeting
Basically very similar to routine activities

• Planning Budget
• Pre Survey
  – Procurement
  – Training
• During Survey
  – Field Operation & Central Management
    • Quality Assurance
• Post Survey
  – Data management & Analysis
  – Dissemination ➔ USE TEMPLATE to estimate
Develop budget more seriously
Funding agencies becomes stricter

• Sample size, Number of clusters and nature of terrain – transportation plan
• Capital investment: X-ray and Lab Equipment
• Staff costs
  – Per diem
  – Salary
  – Additional salary, Incentive
  – Fees
Outline of the study

• At least the outline of the study design should be written to develop a study proposal with budget proposal

• Check available resources especially those for CXR and Lab
  – Which method you will use
    • Discuss in CXR and Lab section
Basic Operation Schedule: Cluster/Week

Sunday: Arrival & Basic Preparation
Monday: Census
Tuesday/Wednesday: Interview, X-ray, Sputum collection
Thursday: Interview, X-ray, Sputum collection,
   Sputum transfer to CENAT
Friday: Sputum collection, (X-ray for drop out), sputum collection
Saturday: sputum collection (morning only), Debriefing
   Departure

Long term continuous field activities → simulate what are required
Survey Days

Who will do what how much it will cost....
Field Work

- Required days for a cluster: often overestimated due to the underestimation of daily capacity: 150-180 participants can be examined comfortably (Thai: 300 by DR)
- Required duration of the survey: often underestimated- Break due to national holidays, natural disaster etc. Staff need break both for health and quality of work
Example

- 12 staff from central unit with full per diem for 7 days
- 5 local staff with local per diem for 5 days
- 5 local volunteers with incentive for 5 days

- Enables for participants
- Consumables
- Rentals and transportation
Capital investment: Big Items

• Procurement or Lease?
• When procured, long term plan is essential

  10,000USD portable unit: use only for a survey to take 10,000 images = 1$/image will be acceptable as a small district hospital may have a 30,000$ machine to have 20-30 films a day for 5 years.

  However, when you propose digital system or X-ray van, you need to submit a long term use plan.
Or

- Such procurement can be done under the Active or Intensive Case detection for PLWHA, prisoners, refugees…..Then borrow them for the survey.

It is not fair to put everything to the survey budget to inflate the cost.
Central work

• Appropriate costing
  – Smear, Culture, CXR reading, Data entry
  – Consider quantity – daily capacity
  – Paying to individuals or institute?
Quality Control/Assurance

• Can’t neglect efforts to avoid any possible biases
• Regular monitoring and Mid-term Review to avoid inter-survey teams’ bias including inter labs’

Lesson: Mid-term Review WS with staff retreat was very useful to correct differences between the teams and to motivate staff
Technical Assistance

Good Epidemiologist

Quality Assurance

Not only central desk work but also field work are essential

Lesson: Interagency collaboration with flexible budget support is essential to assist a country to carry out a prevalence survey
Other components tend to be neglected/not sufficient in budget

- Security arrangement
- IEC materials including those to obtain informed consent
- DOT after the survey especially in remote clusters without access to NTP
- Data management
- Dissemination

Preparation Meeting with local police and community leaders
Introducing new technology or something new

• Check your country regulations
• Read and consult carefully
• Negotiate to get Exception
  – Yes, X ray room in medical facilities must be properly shielded, however X ray is actually taken in operation room, emergency room and even in a general/pediatric wards.
  – Do you know X ray is used in construction sites (diagnosing building)?
Procurement

• Capital investment
  – Find very early if you need to procure expensive items especially through international shopping
    • Ex. X-ray equipment, cars

• Consumables
  – Find if your regular items can cover most needs or you need something different
    • Ex. sputum cup, X-ray films

Lesson: We need to consider some specific arrangement of procurement for surveys and researches to avoid delay and to get proper quality items
Procurement: Bottleneck in preparation

- Delay of survey implementation
- A few months delay will cause rescheduling of cluster visits due to monsoon, heat, snow
- Trained staff will leave

Don't leave it after the order. You need to follow it up, push them, call them…
Logistics/Procurement or Lease

“Do it your self” or “Out sourcing”

- Different screening method needs different items
- Car
  - Availability of cars could be a major bottle neck factor to operate numbers of teams at one time
- Sputum Transportation
  - Cold chains
- Contract/ Private sector
  - May ask private sector for non-medical supply and some transportation with contract
Very hard to get right things for the study through international procurement

- **CXR, processors, generators**
  - Portability, durability

- **Sputum Container**

- **Slide Glass**
  - Tropical or Regular package?

Screw cap or Snap cap?
When you receive them

• Don't leave them without opening/test operation
  – Some contracts such as claim and maintenance will be expired if you don't take action
  – Some software/registration need to be activated within a limited period
Do quality survey
Let’s have a better view