

PLAN HEALTH ADVOCACY AND DEVELOPMENT FOUNDATION (PLAN FOUNDATION)

COMMUNITY ADVISORY BOARDS (CAB) POLICY Version 1.0

July 2026

PLAN HEALTH ADVOCACY AND DEVELOPMENT FOUNDATION (PLAN FOUNDATION) COMMUNITY ADVISORY BOARDS (CAB) POLICY: A GOVERNANCE FRAMEWORK FOR MEANINGFUL COMMUNITY ENGAGEMENT IN HEALTH, RESEARCH AND DEVELOPMENT

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LIST OF ACRONYMS

CAB – Community Advisory Board

CEI – Community Engagement and Information

CEAS – Community Engagement and Advisory System

CIOMS – Council for International Organizations of Medical Sciences

CSO – Civil Society Organization

GPP – Good Participatory Practice

IRB – Institutional Review Board

M&E – Monitoring and Evaluation

NIHR – National Institute for Health and Care Research (United Kingdom)

NGO – Non-Governmental Organization

PPI – Patient and Public Involvement

SRHR – Sexual and Reproductive Health and Rights

TB – Tuberculosis

UNAIDS – Joint United Nations Programme on HIV/AIDS

WHO – World Health Organization

FOREWORD

Communities are central to sustainable development.

For more than two decades, PLAN Health Advocacy and Development Foundation (PLAN Foundation) has worked alongside communities to address complex health and development challenges through evidence-informed programming, strategic advocacy, community engagement, operational research, implementation science, capacity strengthening and partnership building.

Our experience across tuberculosis, HIV, disability inclusion, sexual and reproductive health and rights, child health, maternal health, clubfoot, health systems strengthening and community development has consistently reinforced one fundamental lesson: programmes are more effective, more equitable and more sustainable when communities participate as genuine partners throughout the programme lifecycle.

Internationally, Community Advisory Boards (CABs) have become recognised as an important mechanism for ensuring that research and development programmes remain responsive to community priorities while promoting ethical practice, accountability and public trust. PLAN Foundation has actively participated in and supported numerous national, regional and global Community Advisory Boards and community engagement platforms, contributing to research, policy development, treatment literacy, implementation science and advocacy initiatives.

Drawing upon these experiences and informed by internationally recognised guidance issued by the World Health Organization (WHO), the Council for International Organizations of Medical Sciences (CIOMS), the Joint United Nations Programme on HIV/AIDS (UNAIDS), the Good Participatory Practice (GPP) Guidelines, the National Institute for Health and Care Research (NIHR), the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD), and other global frameworks, this Policy establishes the institutional standards governing Community Advisory Boards established or supported by PLAN Foundation.

This Policy affirms that community engagement is not a one-time activity undertaken to fulfil donor or ethical requirements. Rather, it is a core institutional value, a governance principle and a continuous process of dialogue, mutual learning, shared accountability and collaborative action.

The Policy provides an organisational framework for establishing Community Advisory Boards that are independent, representative, inclusive and accountable,

while ensuring that community knowledge, lived experience and priorities meaningfully influence programme design, implementation, monitoring, evaluation, learning and policy translation.

Through this Policy, PLAN Foundation reaffirms its commitment to strengthening community voice, promoting social justice, advancing health equity and ensuring that communities remain active partners in improving health and development outcomes.

PART I

PREAMBLE

PLAN Foundation believes that sustainable health and development cannot be achieved without the active participation, leadership and ownership of communities. Communities possess unique knowledge, lived experiences and capacities that are essential for generating evidence, improving programs and influencing policy. This Policy is therefore founded on the conviction that meaningful community engagement is not an optional program activity but a fundamental governance principle underpinning ethical, equitable and people-centred development.

1. POLICY STATEMENT

PLAN Health Advocacy and Development Foundation (PLAN Foundation) is committed to promoting meaningful, ethical, inclusive and sustained community engagement across all health and development programmes.

The Foundation recognizes that communities possess unique knowledge, lived experiences and perspectives that are indispensable to designing responsive programmes, generating relevant evidence, improving service delivery and strengthening accountability.

Accordingly, PLAN Foundation shall establish or support Community Advisory Boards (CABs), where appropriate, as structured mechanisms for facilitating dialogue, partnership and shared decision-making between communities, researchers, programme implementers, policymakers and other stakeholders.

Community Advisory Boards established under this Policy shall operate independently while maintaining constructive collaboration with PLAN Foundation and its partners. Their recommendations shall inform programme planning, implementation, monitoring, evaluation, learning, dissemination and policy engagement.

This Policy shall guide all Community Advisory Boards established or supported by PLAN Foundation regardless of disease area, programme type, funding source or geographical location.

2. BACKGROUND

Community participation has long been recognised as a cornerstone of effective public health practice and sustainable development. From the Alma-Ata Declaration on Primary Health Care (1978) through the Sustainable Development Goals (SDGs), global health institutions have consistently emphasised that people and communities must play active roles in decisions affecting their health and wellbeing.

In research, the importance of community engagement has been reinforced through international ethical guidance including the CIOMS International Ethical Guidelines, WHO guidance on community engagement and implementation research, UNAIDS Good Participatory Practice (GPP) Guidelines, and the NIHR Standards for Public Involvement. These frameworks recognise that meaningful engagement improves research quality, enhances public trust, strengthens participant protection and facilitates translation of research findings into policy and practice.

PLAN Foundation has over two decades of experience implementing community-centred programmes in partnership with governments, academic institutions, development partners, civil society organisations and affected communities. Through these partnerships, the Foundation has successfully utilised Community Advisory Boards and related community engagement structures to strengthen implementation of programmes addressing tuberculosis, HIV, advanced HIV disease, treatment optimisation, sexual and reproductive health and rights, disability inclusion, maternal and child health, clubfoot, operational research and implementation science.

The Foundation's experience has demonstrated that Community Advisory Boards provide more than advisory functions. Properly constituted and supported, they serve as trusted platforms for dialogue, accountability, treatment literacy, research literacy, community mobilisation, evidence generation and policy advocacy.

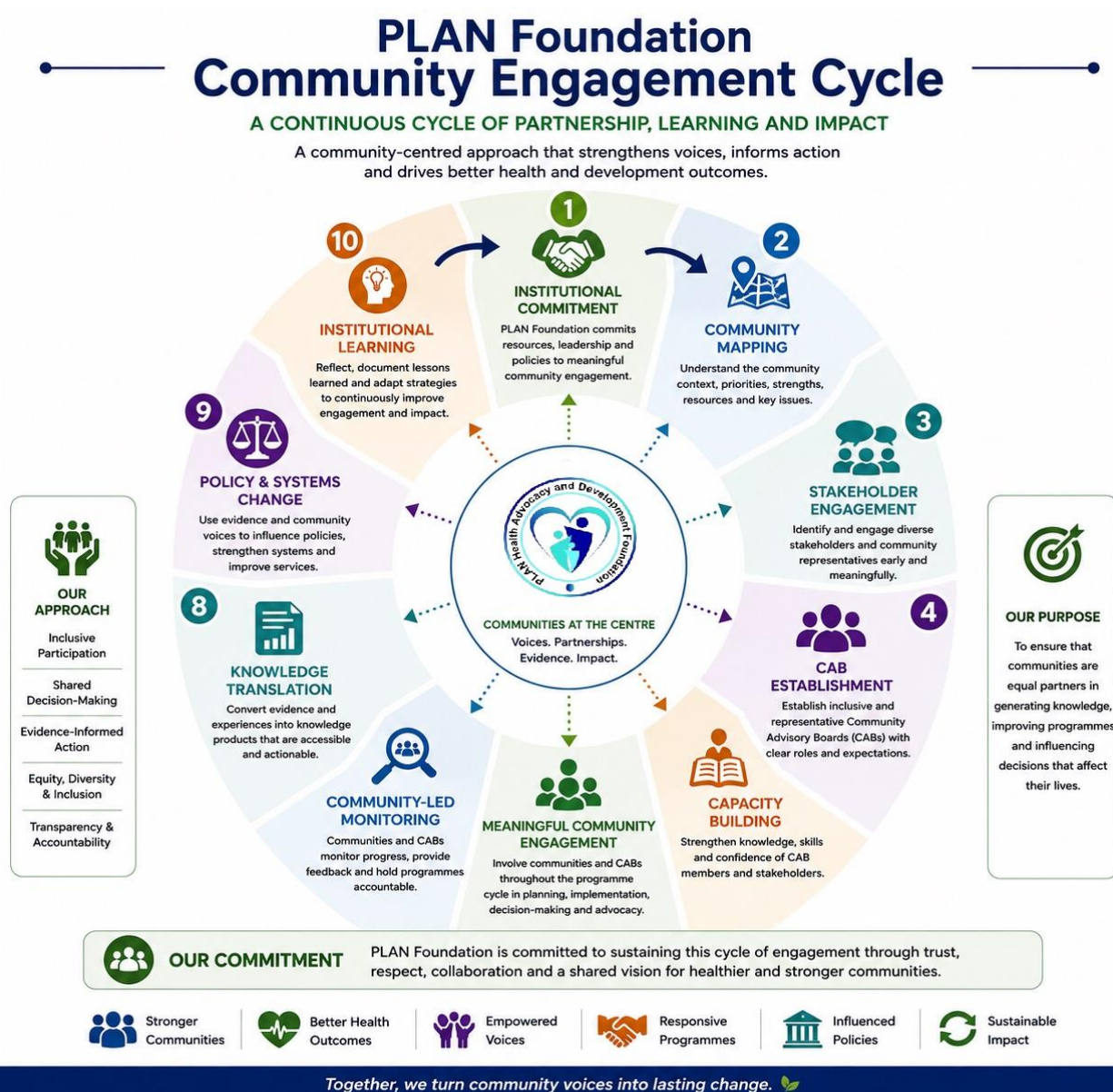
This Policy institutionalises these experiences and establishes a standardised framework for Community Advisory Boards across all PLAN Foundation programmes.

3. PLAN FOUNDATION PHILOSOPHY OF MEANINGFUL COMMUNITY ENGAGEMENT

Meaningful Community Engagement is a foundational value of PLAN Foundation.

The Foundation believes that communities are not passive beneficiaries of health and development programmes but equal partners in generating knowledge, identifying priorities, designing solutions, implementing interventions, evaluating outcomes and translating evidence into policy and practice.

Meaningful Community Engagement is therefore understood as a continuous, respectful and mutually beneficial process through which communities, researchers, programme implementers, policymakers and other stakeholders collaborate throughout the entire programme and research lifecycle.



For PLAN Foundation, meaningful engagement goes beyond consultation. It requires shared ownership, mutual respect, transparency, accountability and recognition of community knowledge as an essential form of evidence.

Community engagement shall therefore be undertaken:

- At the earliest stages of programme conception and research design.
- Throughout implementation and service delivery.
- During monitoring, evaluation and learning.
- During interpretation of findings.
- During dissemination of results.
- During policy dialogue and advocacy.
- Throughout programme sustainability and transition.

The Foundation further recognises that meaningful engagement is strengthened when communities have access to accurate information, opportunities for capacity building, platforms for participation and mechanisms for influencing decisions that affect their lives.

Accordingly, Community Advisory Boards established under this Policy shall promote partnership rather than consultation, dialogue rather than one-way communication, and co-creation rather than passive participation.

4. PURPOSE OF THE POLICY

The purpose of this Policy is to establish an institutional governance framework for the establishment, operation and oversight of Community Advisory Boards across all PLAN Foundation programmes.

Specifically, the Policy seeks to:

1. Institutionalise meaningful community engagement as a core organisational value.
2. Establish common standards governing Community Advisory Boards.
3. Promote ethical, transparent and accountable community engagement.
4. Ensure that community perspectives inform programme and research decisions.
5. Strengthen trust between communities, researchers, programme implementers and policymakers.

6. Promote treatment literacy, research literacy and evidence-informed advocacy.
 7. Enhance programme quality, acceptability and sustainability.
 8. Align PLAN Foundation's community engagement practices with recognised national and international standards.
 9. Provide an institutional framework that may be referenced in research protocols, funding proposals, partnership agreements and programme implementation documents.
-

5. SCOPE

This Policy applies to all programmes, projects, research studies, implementation science initiatives, operational research, advocacy campaigns, policy reform initiatives and partnerships implemented, coordinated or supported by PLAN Foundation.

The Policy applies irrespective of funding source and includes, but is not limited to:

- Clinical research.
- Public health research.
- Operational research.
- Implementation research.
- Health systems strengthening.
- Tuberculosis.
- HIV and AIDS.
- Advanced HIV Disease.
- Chronic Pulmonary Aspergillosis.
- Sexual and Reproductive Health and Rights.
- Disability Inclusion.
- Maternal, Newborn and Child Health.
- Clubfoot and Childhood Disability Programmes.
- Non-Communicable Diseases.

- Climate and Health.
- Community Systems Strengthening.
- Public Health Emergencies.
- Artificial Intelligence and Digital Health.
- Other health and development programmes requiring structured community engagement.

The Policy shall apply to all PLAN Foundation staff, consultants, implementing partners, collaborating institutions and Community Advisory Boards established under the Foundation's authority.

PART II: GOVERNANCE FRAMEWORK

6. GUIDING PRINCIPLES

The establishment, operation and oversight of all Community Advisory Boards (CABs) under the auspices of PLAN Health Advocacy and Development Foundation (PLAN Foundation) shall be guided by the following principles.

6.1 Meaningful Community Engagement

Community engagement shall be continuous, purposeful and mutually beneficial. Communities shall participate as equal partners throughout the conception, design, implementation, monitoring, evaluation, learning, dissemination and policy translation of programmes and research.

6.2 Respect for Human Dignity

Every individual shall be treated with dignity and respect regardless of age, sex, gender identity, disability, ethnicity, religion, socioeconomic status, literacy level, health status, political affiliation or any other characteristic.

6.3 Equity

CABs shall promote equitable participation by ensuring that all members have equal opportunities to contribute irrespective of professional background or educational attainment.

6.4 Diversity and Inclusion

CAB membership shall reflect the diversity of affected communities and intentionally include women, young people, older persons, persons with disabilities, caregivers, community leaders, faith-based organisations, civil society organisations and persons with lived experience.

PLAN Foundation adopts the principle of "**Nothing About Us Without Us**", recognising that decisions affecting communities should not be made without their meaningful participation.

6.5 Independence

Community Advisory Boards shall function independently in providing advice and recommendations.

Neither PLAN Foundation nor any collaborating institution shall compromise the independence of the CAB or unduly influence its recommendations.

6.6 Transparency

The processes for establishing, selecting, supporting and engaging Community Advisory Boards shall be open, fair and transparent.

6.7 Accountability

Community Advisory Boards shall be accountable to the communities they serve while PLAN Foundation shall remain accountable for ensuring that CAB recommendations receive due consideration and documented responses.

6.8 Mutual Learning

Community engagement shall facilitate two-way learning whereby researchers, programme staff and policymakers learn from communities while communities gain access to scientific information, treatment literacy and research literacy.

6.9 Scientific Integrity

CABs shall support evidence-informed decision-making while recognising community knowledge and lived experience as valuable sources of evidence.

6.10 Sustainability

Community engagement shall contribute to strengthening community capacity, local leadership and institutional partnerships beyond the duration of individual projects.

7. POLICY AUTHORITY

This Policy derives its authority from the governance mandate of the Board of Trustees of PLAN Foundation.

The Board authorises the Executive Director to establish Community Advisory Boards as appropriate for research studies, programmes and institutional initiatives implemented by the Foundation.

Implementation of this Policy shall be coordinated by the Programme Directorate under the overall supervision of the Executive Director.

8. DEFINITION OF A COMMUNITY ADVISORY BOARD

For the purposes of this Policy,

A Community Advisory Board (CAB) is an independent, representative, inclusive and structured advisory platform established by PLAN Health Advocacy and Development Foundation (PLAN Foundation) to facilitate meaningful, ethical and sustained engagement between communities, researchers, programme implementers, policymakers and other stakeholders throughout the conception, design, implementation, monitoring, evaluation, learning, dissemination and translation of health and development programmes into policy and practice.

Community Advisory Boards exist to ensure that programmes remain responsive to community priorities while strengthening trust, accountability, inclusion and ethical practice.

Community Advisory Boards are advisory bodies.

They do not replace:

- Institutional Review Boards (IRBs)
- Research Ethics Committees
- Project Steering Committees
- Boards of Trustees
- Programme Management Teams

Rather, they complement these structures by ensuring that community perspectives inform institutional and programme decision-making.

9. TYPES OF COMMUNITY ADVISORY BOARDS

Recognising the diversity of programmes implemented by PLAN Foundation, Community Advisory Boards may be established in different forms depending on programme objectives.

9.1 Research Community Advisory Boards

These support:

- Clinical trials
- Operational research
- Implementation research
- Health systems research
- Behavioural research
- Laboratory research
- Social science research

Their primary functions include promoting ethical conduct, improving participant acceptability, strengthening recruitment and retention strategies, reviewing participant-facing materials and facilitating dissemination of findings.

9.2 Program Community Advisory Boards

These support implementation of health and development programmes.

Examples include:

- Tuberculosis
- HIV
- Malaria
- Advanced HIV Disease
- Sexual and Reproductive Health
- Disability Inclusion
- Clubfoot
- Climate and Health
- Maternal and Child Health
- Community Systems Strengthening

Programme CABs strengthen implementation quality, accountability, service responsiveness and community ownership.

9.3 Policy and Advocacy Community Advisory Boards

These advise on:

- Legislative reform
- National strategies
- Policy advocacy
- Public consultations
- Community accountability
- Social mobilisation

Policy CABs ensure that community voices influence policy development and implementation.

9.4 Emergency Community Advisory Boards

These may be established during:

- Disease outbreaks
- Humanitarian emergencies
- Epidemics
- Pandemics
- Public health emergencies

Emergency CABs facilitate rapid community engagement while promoting public trust and risk communication.

9.5 Institutional Community Advisory Boards

PLAN Foundation may establish standing institutional CABs to provide strategic advice across multiple programmes and sectors.

10. OBJECTIVES OF COMMUNITY ADVISORY BOARDS

Community Advisory Boards established under this Policy shall pursue the following objectives.

Strategic Objectives

- Promote meaningful community engagement.
- Strengthen programme relevance and responsiveness.
- Improve ethical practice.
- Promote transparency and accountability.
- Strengthen community ownership.
- Enhance programme quality.
- Facilitate knowledge co-creation.
- Promote policy influence.
- Strengthen sustainability.

Operational Objectives

Community Advisory Boards shall:

- provide independent advice;
- identify community priorities;
- review communication materials;
- advise on culturally appropriate implementation approaches;
- strengthen treatment literacy;
- strengthen research literacy;
- promote inclusion;
- support demand generation;
- facilitate dialogue between communities and institutions;
- identify emerging risks;
- advise on dissemination strategies;
- strengthen public confidence in programmes.

11. FUNCTIONS OF COMMUNITY ADVISORY BOARDS

Community Advisory Boards may perform the following functions.

Community Representation

Represent community interests during programme planning and implementation.

Community Consultation

Provide structured consultation on proposed interventions, policies and research.

Knowledge Co-Creation

Contribute community perspectives to programme design and evidence generation.

Treatment Literacy

Support development and dissemination of culturally appropriate treatment literacy materials.

Research Literacy

Promote understanding of research processes, participant rights and ethical conduct.

Community-Led Monitoring

Provide structured feedback regarding programme implementation and service quality.

Knowledge Translation

Support dissemination of research findings in formats accessible to communities.

Policy Engagement

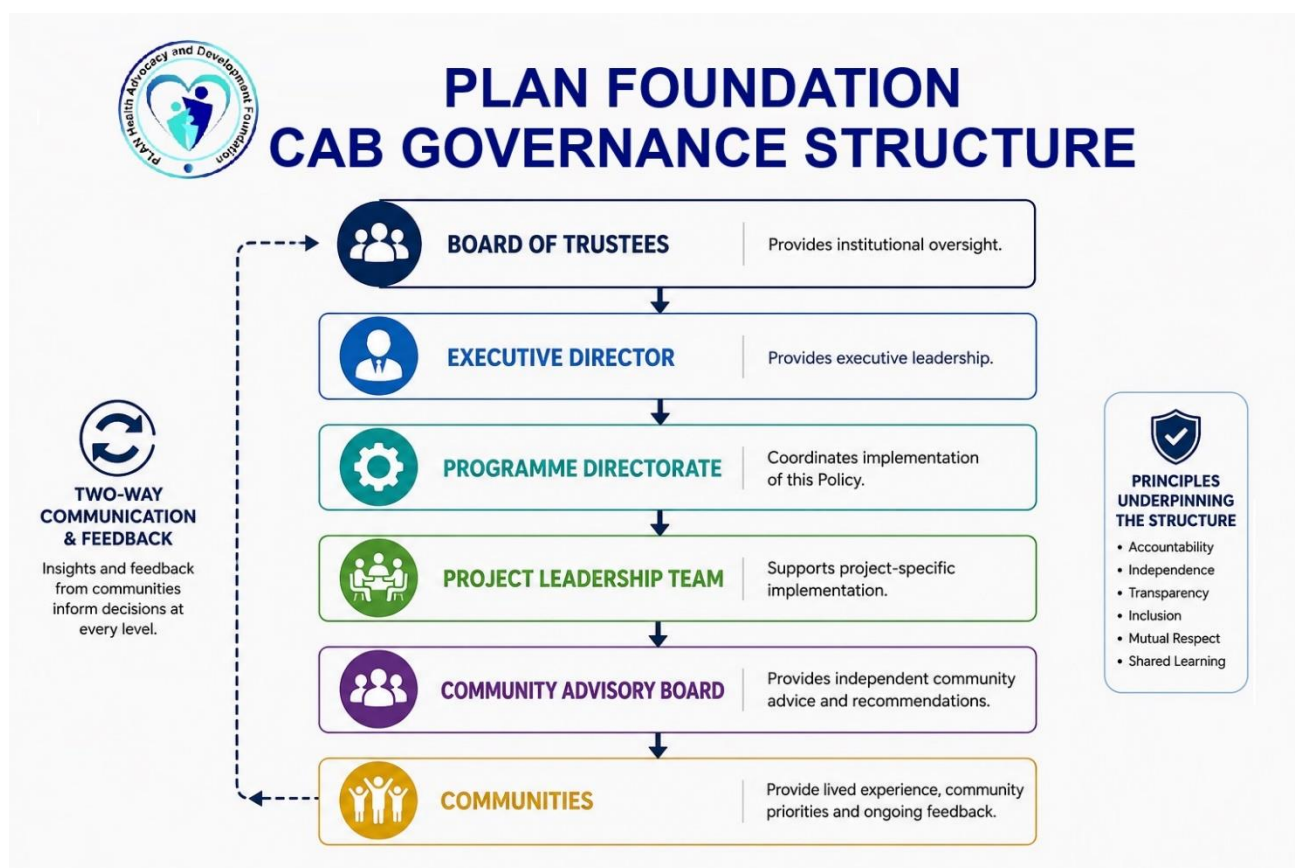
Facilitate dialogue between communities and policymakers.

Advocacy

Promote equitable access to quality services.

12. GOVERNANCE STRUCTURE

Community Advisory Boards established under this Policy shall operate within the following governance framework.



This governance framework ensures that Community Advisory Boards remain sufficiently independent to provide objective advice while being institutionally connected to influence programme decision-making.

13. ROLES AND RESPONSIBILITIES

PLAN Foundation

PLAN Foundation shall:

- establish CABs where appropriate;
- provide administrative support;
- facilitate capacity building;
- ensure timely sharing of information;
- provide feedback on recommendations;
- support monitoring and evaluation;
- promote implementation of CAB recommendations where feasible.

Community Advisory Boards

Community Advisory Boards shall:

- provide independent advice;
- represent community interests;
- maintain confidentiality where appropriate;
- declare conflicts of interest;
- support ethical implementation;
- promote inclusion;
- strengthen accountability;
- engage constructively with stakeholders.

Researchers and Programme Teams

Researchers and programme staff shall:

- engage CABs early;
- provide relevant information;
- consider CAB recommendations;
- communicate decisions transparently;
- support respectful dialogue.

Community Representatives

Community representatives shall:

- communicate community perspectives accurately;
- engage respectfully;
- maintain confidentiality;
- declare conflicts of interest;
- participate actively;
- promote accountability.

14. INSTITUTIONAL ACCOUNTABILITY

PLAN Foundation recognises that effective Community Advisory Boards require reciprocal accountability.

Accordingly:

The Foundation shall remain accountable to communities for ensuring meaningful engagement.

Community Advisory Boards shall remain accountable to the communities they represent.

Researchers shall remain accountable for responding to CAB recommendations.

Programme teams shall remain accountable for documenting how community feedback has informed programme implementation.

This reciprocal accountability strengthens trust and institutional credibility.

PART III – ETHICS, MEMBERSHIP, OPERATIONS AND INDEPENDENCE

15. Membership Principles

- Eligibility
 - Selection principles
 - Representation
 - Persons with lived experience
 - Gender balance
 - Youth representation
 - Disability inclusion
 - Indigenous communities
 - Rural communities
 - Key populations where appropriate
-

16. Independence of CABs

This is one area where many policies are weak.

We'll define:

- Institutional independence
 - Financial independence
 - Intellectual independence
 - Freedom from political interference
 - Independence from donor influence
-

17. Ethical Standards

Including

- Human dignity
 - Respect
 - Confidentiality
 - Data protection
 - Research ethics
 - Safeguarding
 - Do No Harm
 - Voluntary participation
-

18. Conflict of Interest Policy

This should be comprehensive. Including:

- Declaration
 - Register
 - Annual review
 - Management
 - Recusal procedures
-

19. Diversity, Equity and Inclusion Policy

19.1 Policy Statement

PLAN Health Advocacy and Development Foundation (PLAN Foundation) is committed to promoting diversity, equity and inclusion (DEI) as fundamental

principles of meaningful community engagement. The Foundation recognizes that health and development programmes are strengthened when they reflect the perspectives, experiences and knowledge of the diverse populations they are intended to serve.

Community Advisory Boards (CABs) established under this Policy shall therefore be constituted and supported in a manner that promotes equitable representation, meaningful participation and shared decision-making, particularly among populations that have historically been underserved, marginalized or excluded from health research, policy development and programme implementation.

Diversity, equity and inclusion shall not be regarded as compliance requirements but as institutional values that improve programme quality, scientific relevance, ethical integrity and social impact.



19.2 Guiding Principles

PLAN Foundation shall ensure that Diversity, Equity and Inclusion within Community Advisory Boards are guided by the following principles:

- Respect for human dignity and human rights.
- Equal opportunity to participate and contribute.
- Fair and transparent representation.
- Recognition of lived experience as a form of expertise.
- Accessibility and reasonable accommodation.
- Non-discrimination and zero tolerance for exclusion.
- Cultural sensitivity and respect for diversity.
- Shared leadership and collective decision-making.

19.3 Promoting Diversity

PLAN Foundation shall strive to ensure that Community Advisory Boards reflect the diversity of the communities served.

Where appropriate, membership shall include representation from:

- Women and girls.
- Men and boys.
- Adolescents and young people.
- Older persons.
- Persons with disabilities.
- Persons with lived experience of the health condition or programme under consideration.
- Caregivers and family representatives.
- Community-based organizations.
- Civil society organizations.
- Faith-based organizations.
- Traditional and community leaders.

- Minority and underserved populations.
- Rural and hard-to-reach communities.
- Health workers and community volunteers.
- Academic and technical experts, where relevant.

The composition of each CAB shall be determined by the objectives of the programme while ensuring balanced and inclusive representation.

19.4 Equity

PLAN Foundation recognizes that equality alone does not guarantee meaningful participation.

Accordingly, the Foundation shall adopt equitable approaches that identify and address barriers preventing individuals or groups from participating effectively in Community Advisory Boards.

Such measures may include:

- Providing transportation or communication support where appropriate.
 - Scheduling meetings at times convenient for community members.
 - Providing sign language interpretation or other accessibility services.
 - Translating information into local languages where necessary.
 - Using communication materials that are culturally appropriate and easy to understand.
 - Ensuring accessible meeting venues.
 - Providing reasonable accommodation for persons with disabilities.
-

19.5 Inclusion

PLAN Foundation defines inclusion as creating an environment in which every CAB member is respected, heard, valued and able to contribute meaningfully to discussions and decision-making.

Accordingly, Community Advisory Boards shall:

- Encourage respectful dialogue among all members.
- Promote equal opportunities to express opinions.

- Prevent domination of discussions by any individual or stakeholder group.
 - Recognize community knowledge and lived experience as equally valuable alongside technical expertise.
 - Foster an atmosphere of mutual trust, collaboration and shared learning.
-

19.6 Persons with Lived Experience

PLAN Foundation recognizes persons with lived experience as essential contributors to programme design, implementation, monitoring and evaluation.

Where appropriate, Community Advisory Boards shall include individuals who have direct lived experience of the health condition, programme or social issue under consideration.

Their participation shall extend beyond consultation to meaningful involvement in identifying priorities, co-designing interventions, interpreting findings and influencing policy recommendations.

19.7 Disability Inclusion

Consistent with the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) and the principle of **"Nothing About Us Without Us,"** PLAN Foundation shall ensure that persons with disabilities are meaningfully represented within Community Advisory Boards where relevant.

The Foundation shall take reasonable measures to remove physical, communication, institutional and attitudinal barriers that may limit participation.

19.8 Gender Equality

PLAN Foundation shall promote gender-responsive Community Advisory Boards by encouraging equitable participation and leadership opportunities for women and men while recognizing the diverse experiences and needs of people of all gender identities.

Special attention shall be given to addressing gender-related barriers that may affect participation and influence.

19.9 Youth Participation

Recognizing that young people are important agents of change, PLAN Foundation shall promote meaningful youth engagement in Community Advisory Boards, particularly in programmes affecting adolescents and young adults.

Youth participation shall be supported through mentorship, leadership development and age-appropriate engagement approaches.

19.10 Safeguarding Diversity, Equity and Inclusion

All Community Advisory Board members shall contribute to maintaining an environment that is free from discrimination, harassment, intimidation or exclusion.

PLAN Foundation shall not tolerate any form of discrimination based on age, disability, sex, gender, ethnicity, religion, health status, socioeconomic status, political affiliation or any other protected characteristic.

Concerns relating to discrimination or exclusion shall be addressed promptly through appropriate organizational procedures.

19.11 Monitoring Diversity, Equity and Inclusion

PLAN Foundation shall periodically assess the diversity and inclusiveness of Community Advisory Boards through routine monitoring and evaluation.

Indicators may include:

- Diversity of CAB membership.
- Participation and attendance by different groups.
- Representation of persons with lived experience.
- Gender balance.
- Disability inclusion.
- Accessibility of meetings and communication materials.
- Member satisfaction with inclusiveness.
- Evidence of diverse perspectives influencing programme decisions.

Findings from these assessments shall inform continuous improvement of the Foundation's community engagement practices.

Institutional Commitment

PLAN Foundation affirms that diversity, equity and inclusion are essential to ethical, people-centred and evidence-informed health and development practice. The Foundation is committed to ensuring that Community Advisory Boards provide safe, inclusive and accessible spaces where all voices—particularly those of historically underserved and marginalized communities—are respected, valued and able to influence decisions that affect their lives.

Through this commitment, PLAN Foundation seeks to strengthen trust, promote social justice, improve programme quality and ensure that health and development interventions reflect the realities, priorities and aspirations of the communities they serve.

20. Capacity Development

PLAN Foundation commits to developing the capacities of the Community Advisory Boards in several areas including:

Research literacy

Treatment literacy

Policy literacy

Advocacy

Leadership

Communication

Monitoring

Digital engagement

21. Institutional Support

21.1 Institutional Commitment

PLAN Health Advocacy and Development Foundation (PLAN Foundation) recognizes that effective Community Advisory Boards (CABs) require sustained institutional commitment, adequate resources, and an enabling environment to

function effectively. Accordingly, the Foundation shall provide appropriate technical, administrative, financial and operational support necessary to enable CABs to discharge their advisory responsibilities independently, ethically and effectively.

Institutional support shall be provided in a manner that preserves the independence of the Community Advisory Board while promoting meaningful collaboration, mutual accountability and continuous learning.

21.2 Administrative Support

PLAN Foundation shall provide administrative support for the effective functioning of Community Advisory Boards, including:

- Designating an appropriate staff member or Secretariat to coordinate CAB activities.
- Scheduling meetings and circulating meeting notices, agendas and relevant documents in a timely manner.
- Preparing and maintaining records of meetings, attendance and resolutions.
- Maintaining an institutional repository of CAB reports, recommendations and related documentation.
- Facilitating communication between CAB members, programme teams and project partners.

21.3 Technical Support

PLAN Foundation shall provide appropriate technical assistance to strengthen the capacity and effectiveness of Community Advisory Boards through:

- Orientation for newly appointed CAB members.
- Continuous capacity building in research literacy, treatment literacy, implementation science, health systems, ethics, advocacy and policy engagement.
- Access to relevant technical documents, research protocols, programme reports and policy materials.
- Expert resource persons to support technical discussions where necessary.
- Translation of technical information into language and formats that are understandable and accessible to CAB members.

21.4 Financial and Logistical Support

Subject to available resources and donor requirements, PLAN Foundation shall provide reasonable financial and logistical support to facilitate meaningful participation by CAB members, including:

- Transportation support or reimbursement where applicable.
- Communication support for virtual participation.
- Meeting venues and logistical arrangements.
- Accessibility support for persons with disabilities.
- Translation and interpretation services where required.
- Refreshments and other meeting-related expenses consistent with organizational policies.

Such support shall not compromise the independence of the Community Advisory Board or create actual or perceived conflicts of interest.

21.5 Information Sharing

PLAN Foundation is committed to promoting transparency through timely sharing of relevant information with Community Advisory Boards.

Where appropriate, CAB members shall have access to:

- Project concepts and proposals.
- Research protocols and participant-facing documents.
- Programme implementation plans.
- Monitoring and evaluation findings.
- Progress reports.
- Policy briefs.
- Research findings and publications.
- Other documents necessary to enable informed participation.

Information sharing shall be subject to applicable confidentiality, ethical and legal requirements.

21.6 Capacity Development

Recognizing that effective community engagement depends on knowledgeable and empowered community representatives, PLAN Foundation shall invest in continuous learning and professional development for CAB members.

Capacity-building activities may include:

- Community engagement methodologies.
- Research ethics.
- Good Participatory Practice (GPP).
- Community-led monitoring.
- Policy analysis and advocacy.
- Leadership and governance.
- Strategic communication.
- Media engagement.
- Monitoring, evaluation and learning.
- Knowledge translation.
- Digital engagement and emerging technologies relevant to community participation.

21.7 Promoting Diversity, Equity and Inclusion

PLAN Foundation shall actively promote equitable participation within Community Advisory Boards by:

- Removing barriers to participation by women, young people, persons with disabilities and other underserved populations.
- Providing reasonable accommodation for members with disabilities.
- Encouraging participation by persons with lived experience.
- Promoting gender equality and inclusive leadership.
- Ensuring culturally appropriate engagement approaches.

21.8 Respect for CAB Independence

While providing institutional support, PLAN Foundation shall respect the independence of Community Advisory Boards.

The Foundation shall not:

- Direct or influence CAB recommendations.
- Restrict legitimate community perspectives.
- Retaliate against CAB members for expressing independent views.
- Require CAB endorsement of organizational positions without adequate consultation.

CAB recommendations shall be considered objectively, and where recommendations cannot be implemented, the Foundation shall provide clear feedback explaining the reasons.

21.9 Monitoring Institutional Performance

PLAN Foundation shall periodically assess its own performance in supporting Community Advisory Boards.

Institutional performance indicators may include:

- Timeliness of information sharing.
- Responsiveness to CAB recommendations.
- Quality and frequency of capacity-building activities.
- Diversity and inclusiveness of CAB membership.
- Adequacy of logistical and administrative support.
- CAB satisfaction with institutional support.
- Evidence of community feedback influencing programme decisions.

Findings from these assessments shall inform continuous improvement of the Foundation's community engagement practices.

21.10 Institutional Commitment to Continuous Improvement

PLAN Foundation is committed to strengthening its systems, policies and practices for community engagement through ongoing learning, innovation and collaboration with communities, academic institutions, governments and development partners.

The Foundation shall periodically review its institutional support mechanisms to ensure that Community Advisory Boards remain effective, responsive and aligned with emerging national and international standards for meaningful community engagement.

PART IV – QUALITY ASSURANCE, IMPLEMENTATION AND POLICY REVIEW

Monitoring & Evaluation Framework

KPIs

Quality indicators

Representation indicators

Participation indicators

Impact indicators

20. Community-Led Monitoring

20.1 Policy Statement

PLAN Health Advocacy and Development Foundation (PLAN Foundation) recognizes Community-Led Monitoring (CLM) as a core component of meaningful community engagement, accountability and continuous quality improvement. The Foundation believes that communities play a vital role in identifying barriers to quality services, monitoring programme performance and generating evidence that strengthens programmes, health systems and policy.

Accordingly, Community-Led Monitoring shall be integrated, where appropriate, into research, programme implementation and advocacy through Community Advisory Boards (CABs) and other community engagement mechanisms.

20.2 Purpose

Community-Led Monitoring enables communities to contribute directly to programme improvement, institutional learning and policy development by providing real-time feedback on service delivery, programme performance and community experiences.

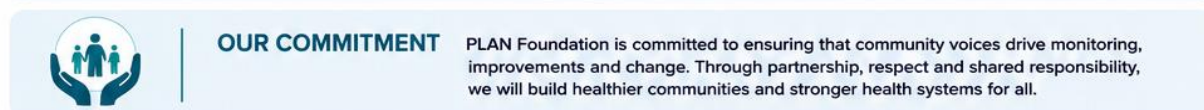


PLAN FOUNDATION Community-Led Monitoring Framework

Communities Generate Evidence. Evidence Drives Action. Action Improves Lives.



Communities are equal partners in monitoring, improving and transforming health and development programmes.



TOGETHER, WE:

- ✓ Listen to communities
- ✓ Learn from experience
- ✓ Act on evidence
- ✓ Transform lives

STRONGER COMMUNITIES. ACCOUNTABLE PROGRAMMES. BETTER HEALTH OUTCOMES.

20.3 Objectives

Community-Led Monitoring aims to:

- Strengthen accountability and community ownership.
- Identify barriers to access, quality and equity.
- Generate community-driven evidence for programme improvement.
- Support evidence-informed advocacy and policy dialogue.
- Promote continuous learning and responsive programme management.

20.4 Scope

Depending on the programme, Community-Led Monitoring may assess:

- Access to and quality of services.
- Client satisfaction and user experience.
- Referral systems and continuity of care.
- Equity and inclusion.
- Availability of medicines, commodities and diagnostics.
- Community awareness, treatment literacy, stigma and discrimination.
- Implementation of CAB recommendations.

20.5 Approaches

PLAN Foundation shall use participatory methods such as community scorecards, client satisfaction surveys, focus group discussions, community dialogues, routine monitoring visits and digital feedback platforms to collect and use community-generated evidence for programme improvement.

20.6 Use of Findings

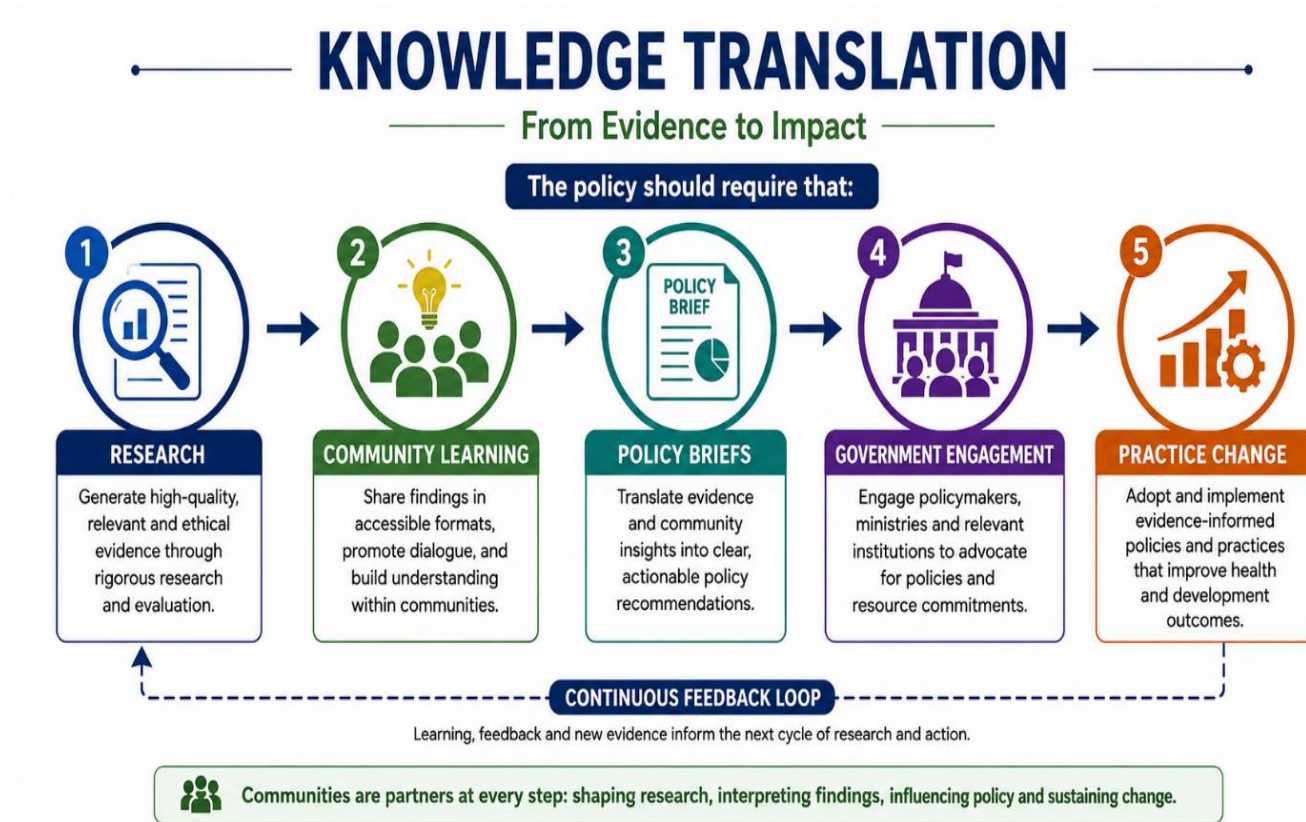
Community-Led Monitoring findings shall inform programme improvement, capacity building, advocacy, policy briefs, operational research and organizational learning. Where appropriate, PLAN Foundation shall provide feedback to communities on actions taken, promoting transparency and mutual accountability.

20.7 Institutional Commitment

PLAN Foundation is committed to strengthening Community-Led Monitoring by building community capacity, promoting the use of community-generated evidence and ensuring that community perspectives influence programme decisions, research and policy.

By integrating Community-Led Monitoring into its Community Advisory Board framework, the Foundation affirms that sustainable health and development programmes are achieved by listening to communities, acting on their recommendations and fostering shared accountability.

Knowledge Translation



Communications

Public communication

Media

Social media

Risk communication

Crisis communication

Documentation

Record management

Institutional memory

Learning repository

22. CAB Policy Implementation Framework

22.1 Purpose

PLAN Health Advocacy and Development Foundation (PLAN Foundation) recognizes that the effectiveness of this Policy depends on its consistent implementation, monitoring, learning and periodic review. This Framework provides a roadmap for institutionalizing Community Advisory Boards (CABs) across the Foundation's research, programmes and advocacy initiatives while promoting accountability, quality and meaningful community engagement.

22.2 Implementation Principles

Implementation of this Policy shall be guided by the principles of:

- Institutional leadership and ownership.
- Meaningful community engagement.
- Transparency and accountability.
- Equity, diversity and inclusion.
- Collaboration and partnership.
- Evidence-informed decision-making.
- Continuous learning and improvement.
- Sustainability.



PLAN Foundation Policy Implementation Framework

A ROADMAP FOR MEANINGFUL COMMUNITY ENGAGEMENT AND IMPACT

A structured, inclusive and accountable process for establishing, strengthening and sustaining Community Advisory Boards across PLAN Foundation programmes and research.



OUR IMPLEMENTATION PRINCIPLES



INSTITUTIONAL LEADERSHIP



MEANINGFUL PARTICIPATION



TRANSPARENCY & ACCOUNTABILITY



EQUITY, DIVERSITY & INCLUSION



COLLABORATION & PARTNERSHIP



EVIDENCE-INFORMED DECISION-MAKING



SUSTAINABILITY

Together, we create solutions that reflect community priorities and improve lives.

22.3 Implementation Roadmap

Implementation of this Policy shall be undertaken through the following phases:

Phase 1: Institutional Adoption

Following approval by the Board of Trustees, the Policy shall be communicated across the Foundation and integrated into organizational governance, programme planning, research and proposal development.

Phase 2: CAB Establishment

Where appropriate, Community Advisory Boards shall be established in accordance with this Policy through community mapping, stakeholder engagement, member selection and orientation.

Phase 3: Capacity Strengthening

PLAN Foundation shall provide continuous capacity building for CAB members and staff in community engagement, research and treatment literacy, ethics, advocacy, leadership and monitoring.

Phase 4: Meaningful Community Engagement

CABs shall participate throughout the programme and research lifecycle by contributing to programme design, implementation, monitoring, dissemination of findings and policy dialogue.

Phase 5: Monitoring, Learning and Knowledge Translation

The Foundation shall monitor CAB performance, document lessons learned and translate evidence into community education, policy briefs, advocacy and programme improvement.

Phase 6: Policy Review

This Policy shall be reviewed every three (3) years, or earlier where necessary, through consultation with CABs, programme staff, researchers, community representatives and relevant stakeholders.

22.4 Roles and Responsibilities

Implementation of this Policy shall be a shared responsibility.

- **Board of Trustees:** Provide institutional oversight and approve policy revisions.

- **Executive Director:** Provide strategic leadership and ensure organizational compliance.
 - **Programme Directorate:** Coordinate implementation and monitor compliance.
 - **Project Teams:** Establish and support CABs in accordance with this Policy.
 - **Community Advisory Boards:** Provide independent advice and represent community interests.
 - **Community Members and Partners:** Participate actively in dialogue, learning and accountability.
-

22.5 Commitment to Continuous Improvement

PLAN Foundation is committed to continuously strengthening its community engagement systems through learning, innovation and collaboration. Lessons from implementation, emerging evidence and stakeholder feedback shall be used to improve Community Advisory Boards and ensure this Policy remains relevant, responsive and aligned with national and international best practices.

PART V – REFERENCES

- WHO
 - CIOMS
 - UNAIDS
 - GPP
 - NIHR
 - UNICEF
 - UNESCO
 - UNCRPD
 - SDGs
 - African Union
 - Nigeria National Code of Health Research Ethics
 - National Health Act
 - Relevant Nigerian policies
-

CONCLUSION

PLAN Foundation believes that sustainable health and development programmes are built on genuine partnerships with communities. Through this Policy, the Foundation affirms its commitment to ensuring that communities remain at the centre of every programme, every research project and every policy dialogue.

Community Advisory Boards shall therefore remain a cornerstone of PLAN Foundation's approach to meaningful community engagement, evidence-informed programming and accountable development practice.