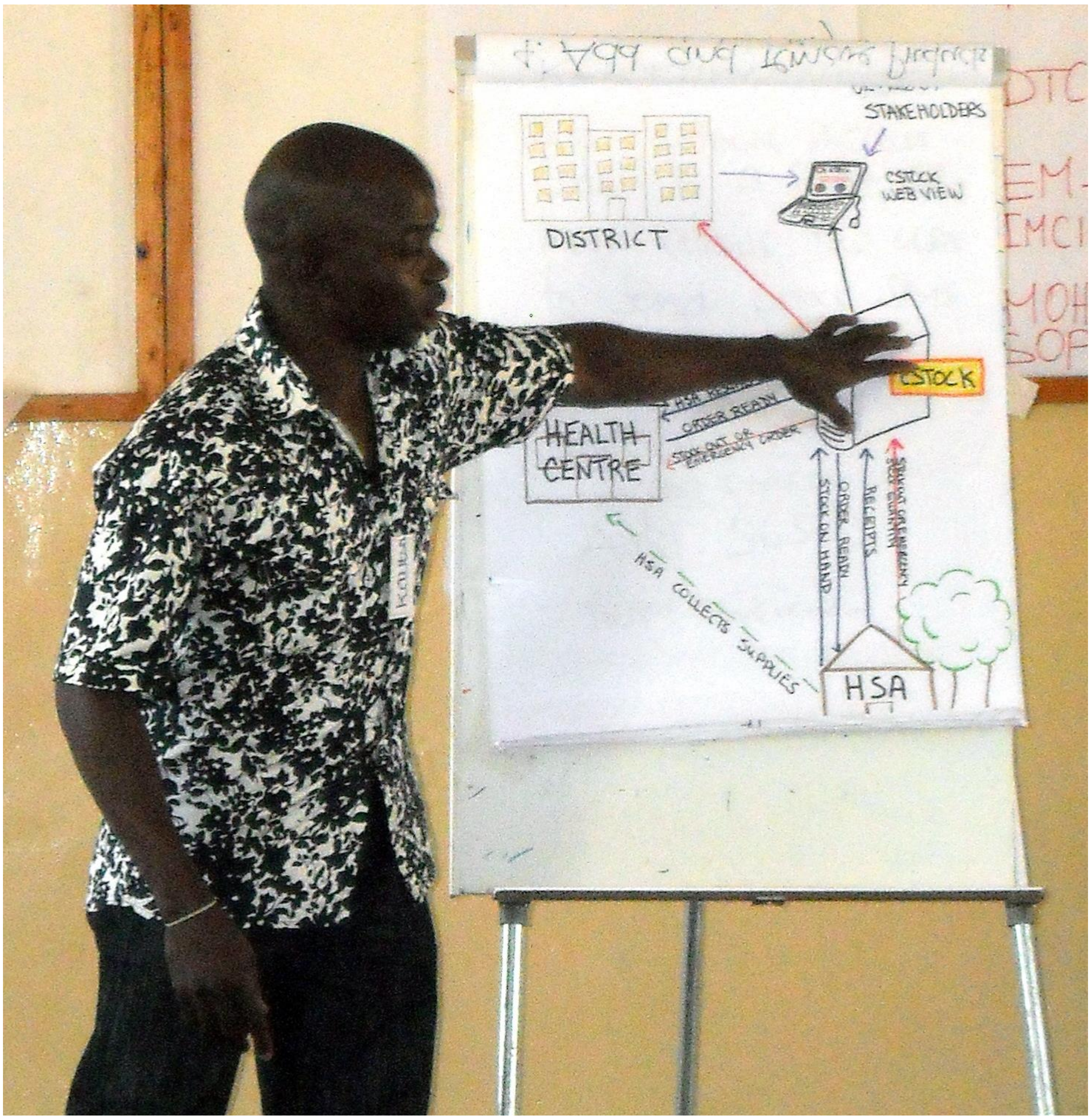
Malawi

Ministry of Health

Enhanced Management Trainers Guide:

District and Cluster Supervisor's Training

November 2020



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Acronyms

iCCM	integrated Community Case Management
DHMT	District Health Management Team
DPAT	District Product Availability Team
DTC	Drug and Therapeutic Committee
EM	Enhanced Management (Approach)
EO	Emergency Order
HSA	Health Surveillance Assistant
HTS	HIV Testing Services
IMCI	Integrated Management of Childhood Illness
JSI	John Snow Incorporated
LMIS	Logistics Management Information Systems
MOH	Ministry of Health
MOS	Months of Stock
OJT	On Job Training
OS	Out of Stock
Q&A	Question and Answer
SC	Supply Chain
SC4iCCM	Supply Chain for integrated Community Case Management
SMS	Short Message Service
SOH	Stock on Hand
SOP	Standard Operating Procedures

Workshop Goal and Objectives

Participants will work to ensure community health product availability through a team approach to supply chain performance monitoring and problem solving supported by increased access to information about stock levels and facilitated resupply procedures.

By the end of the two-day workshop, participants will be able to:

1. Describe the purpose of the EM approach and its relationship to the current procedures for managing community health products.
2. Outline the flow of product information in the cStock system.
3. Describe their roles and responsibilities in the management of community health products using the procedures as outlined in the EM Standard Operating Procedures (SOPs).
4. Identify their Product Availability Team, the vision of the team, the customer service mission of the team, and the responsibilities of the team in ensuring product availability and problem solving.
5. Access the cStock and identify product and facility information found in cStock.
6. Describe the dashboard alerts, how to interpret the alerts, and what actions they should take in responding to alerts.
7. Print facility performance reports from cStock and interpret the reports to identify good facility performance and specific facility problems with a focus on stock levels, reporting rates, timeliness and order fill.
8. Identify possible solutions to common problems related to product availability.
9. Identify current facility and team supply chain performance, set targets for improved performance and develop a plan for achieving those targets.
10. Use a management diary to record actions taken to solve product availability and supply problems.
11. Develop a plan for recognizing and rewarding good team and facility product availability and supply chain management performance.

Workshop Schedule

Day 1

8:30 – 9:10	Introduction to the Workshop
9:10 – 10:00	Community Case Management and other community health programs
10:00 – 10:15	Tea Break
10:15 – 11:00	Purpose of the Enhanced Management Approach
11:00 – 12:00	Roles and Responsibilities in Enhanced Management
12:00 – 1:00	Lunch
1:00 – 3:00	Forming Product Availability Teams with a Goal
3:00 – 3:15	Tea Break
3:15 – 3:45	Introduction to cStock and Registering
3:45 – 4:45	cStock Nags and Alerts
4:45 – 5:00	Closing and Homework Assignment

Day 2

8:30 – 9:00	Introduction to the Day and Homework Review
9:00 – 10:00	Monitoring Team Performance at District
10:00 – 10:15	Tea Break
10:15 – 11:00	Monitoring Team Performance at District
11:00 – 12:00	Monitoring Team Performance at HC
12:00 – 1:00	Lunch
1:00 – 1:30	Setting Performance Targets
1:30 – 3:00	Planning and Conducting Effective DPAT Meetings
3:00 – 3:15	Tea Break
3:15 – 3:45	DPAT Meetings cont. (Management Diaries)
3:45 – 4:45	Recognizing Performance
4:45 – 5:00	Workshop Evaluation and Closing

1. Introduction to the Workshop

Session Objectives:

By the end of the session, participants will be able to:
1. Form an effective workshop group
2. Describe the goal, objectives, and schedule for the workshop
3. Identify other participants in the workshop

Time: 40 minutes

Materials:
Flip chart, markers

Handouts:
Workshop Schedule

Prepared Flipcharts:
Workshop goal and objectives
Questions for participant introduction exercise

Trainer Preparation:
If desired, organizers should invite in advance an appropriate MOH official to preside over the opening and closing sessions of the workshop. It is helpful to discuss with the official any points you would like the person to emphasize, e.g., importance of the activity, MOH support for EM.

Learning Activities Summary:

Title	Type	Time
1. Welcoming participants and guests	Trainer introduction	3
2. Brief remarks of MOH official	Lecturette	10
3. Participant introductions	Paired discussion / plenary	10
4. Review of background of EM, and goal, objectives and schedule of workshop	Lecturette / Q&A	15
5. Session Conclusion	Participant Recap	2

Learning Activities:

1. **Welcome of participants and guests – 3 minutes**
   The facilitator for the session should ensure that the workshop starts on time by welcoming all participants, introducing the theme of the workshop and introducing invited officials.

2. **Participant Introductions– Pairs Activity - 10 minutes**
   Ask participants to choose a partner whom they do not know well. They should find out the following information about each other:
   - Name
   - Work site and job
   - Favourite leisure activity

   The facilitator should then guide participants to quickly introduce their partner in plenary.

   Trainers should participate in the introduction exercise.

3. **Brief remarks of MOH official – 10 minutes**
   Be sure that the invited speaker understands the time constraints and important points to emphasize, such as the critical nature of uninterrupted supply, the importance of working in problem-solving teams, etc.

   The facilitator should introduce the official and alert the speaker if s/he appears close to running out of time.

   Once the speaker opens the meeting, the facilitator can call for a small break so that the official can leave.

4. **Review of workshop goal, objectives and schedule – 15 minutes**
   Provide brief background of the Supply Chains for integrated Community Case Management (SC4iCCM) Project activities in collaboration with MoH leading up to this workshop; include summary baseline results, summary of findings and decisions from the evaluation. Use the prepared flipchart / power-point to review the goal, objectives and schedule for the workshop. Note that this workshop includes District level staff and Cluster Supervisors; and that subsequent workshops will include the Health Centre staff and HSAs. Emphasize that there is much to cover in these two days therefore participants are expected to participate actively and be on time.

   Participants should be informed about logistics such as location of bathrooms, arrangements for per diems, etc.

5. Session conclusion – 2 minutes

Ask if there are any questions or concerns.

Thank participants for their participation and explain that we will now be starting our first session related to this initiative of enhanced management.

2. iCCM and Other Community Health Programs

Session Objectives:
By the end of the session, participants will be able to:

1. Describe the purpose and general content of community case management (ICCM) and other community health programs, including diseases and conditions covered.
2. Describe the importance of ICCM and other community health programs for achieving the government of Malawi's health goals
3. Demonstrate understanding of the need to allocate budget and products to ICCM and other community health programs

Time: 50 minutes

Materials:
Flipchart, markers, LCD, laptop

Handouts:

Prepared Flipcharts / power-point:
Leading Causes of Under-5 Mortality, Malawi context

Trainer Preparation:
Prepare flip charts / power-point ahead of the session.

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. ICCM and other Community Health Programs	Lecturette / Discussion	10
3. Benefits of Community Health Programs	Small Group /Plenary Discussion	30
4. Importance of effective Supply Chain Management in Community Health Programs	Discussion	10
5. Session Conclusion	Discussion	5

Learning Activities:

1. **Session Introduction – Lecturette – 5 minutes**
   Explain that this workshop focuses on reporting and resupply related to community health products, including those specifically used for community case management (iCCM) of the three common childhood illnesses (malaria, diarrhea, pneumonia), family planning (FP), and HIV Testing Services (HTS) at community level. Although participants are familiar with iCCM and other community level managed programs. It is critical to understand the overall purpose of these community managed health programs; how they relate to Malawi's overall maternal and child health, HTS and why supply chain management is critical for their success.

2. **ICCM and other Community Health Programs – Lecturette / Discussion – 10 minutes**
   Explain that, the global community, including the government of Malawi, has committed to achieving Sustainable Development Goal number 3 (Ensure healthy lives and promote well-being for all at all ages). As one of the strategies to address this goal, the government of Malawi is implementing some community health programs to improve coverage and impact by taking health services to hard-to-reach communities.

   Ask participants if they know what iCCM stands for. Answer should be integrated Community Case Management. Now ask them what the definition of iCCM is.

   Be sure that the definition includes the following key points:
   iCCM is a global strategy supported by the government to improve treatment of the most common health conditions that kill children, especially in hard-to-reach areas where facility-based services are not available.

   Now ask participants what are the most common causes of under-5 mortality in Malawi. Once you have a few ideas then review the prepared flipchart / power-point of the conditions responsible for most under-5 mortality in Malawi.

   Review the flipchart / power-point of the conditions responsible for most under-5 mortality in Malawi.

Leading Causes of Under-5 Mortality, Malawi Context (DHS 2015/16)

- Malaria (14%)
- HIV (14%)
- Diarrhea (8%)
- Pneumonia (12%)
- Neonatal causes (34%).

Malawi attained MDG 4 in 2015

Explain that iCCM is aimed at addressing these critical causes of child mortality in the most affected geographic areas.

Ask participants why family planning is important for reducing maternal mortality?

Be sure that it includes the following key points:

Family planning saves women's lives. Family planning could prevent as many as one in every three maternal deaths by allowing women to delay motherhood, space births, avoid unintended pregnancies and abortions, and stop childbearing when they have reached their desired family size.

Ask participants if they know the fertility rate in Malawi. Then show flipchart.

Spacing Births to Improve Maternal Mortality (DHS 2015/16)

- Total fertility rate (children per women) (4.4)
- Percentage of married women currently using any modern method of family planning (58%)

Now ask what is the prevalence for HIV in Malawi?
Answer**: 8.8%** (DHS 2015/16)

Ask participants why HTS is important for halting the spread of HIV?

HIV testing Services (HTS) have helped millions of people learn their HIV status and for those testing positive, learn about options for long term care and treatment and how to prevent their loved ones from contracting HIV.

You can see that in order to address these gaps for health services the Ministry of Health is offering community health programs to benefit underserved populations in hard to reach areas.

3. Benefits of Community Health Programs – Small Group/Plenary Discussion – 30 minutes

A. Small Group Discussion (15 minutes)

Divide the participants into four groups (by level – see below) and have each discuss and list the benefits of iCCM at one of the following levels. Explain that since HSAs manage community products for iCCM, FP, EPI and HIV.
In their discussion groups, they should also think about the benefits of these programs.

Tell them in advance that they will need to summarize and report their findings in plenary.

What are the benefits of iCCM and other community health programs?

- At facility level
- At district level
- At national level
- To community members in hard to reach areas

B. Plenary presentation (15 minutes)

Have each group present its summary benefits in plenary. Be sure that the following key points are included for each applicable level in the system.

- Allows essential child and maternal health care, as well as HIV testing and prevention and family planning to be taken to underserved populations in hard to reach rural communities.
- Community health program approach increases the total numbers of clients receiving appropriate treatment and health services when they need it, rather than just changing the place where they get such services
- The presence of trained HSAs in communities does increase both availability of services and knowledge and willingness of families to seek appropriate care.
- iCCM targets hard-to-reach areas that typically have higher mortality rates than areas closer to existing health facilities.

4. Importance of effective Supply Chain Management in Community Health Programs – Discussion –10 minutes

Ask participants to list reasons that supply chain management is critical to the implementation of community level programs, such as iCCM

- iCCM is a <u>treatment</u> program and treatment requires products
- FP requires contraceptives to be available to prevent unplanned pregnancies
- HTS cannot be performed if HIV rapid tests and the associated supplies are not available
- Lack of products undermines confidence in the program and lowers community demand for poor or unavailable services
- EPI requires vaccines, vitamin A, deworming tablets and syringes.
- Other?

Remind participants that the MOH in Malawi strives to integrate systems at all levels, including the community level. HSAs manage community health products for iCCM, Malaria, family planning, and HIV testing. This means that supply chain management for iCCM must take into account other products HSAs manage and that improvements made for iCCM have the potential to benefit a broad range of services that HSAs offer.

5. Session conclusion – Participant Recap – 5 minutes

Ask a participant to summarize the key points that have been covered during this session.

3. Purpose of the Enhanced Management Approach

Session Objectives:

By the end of the session participants will be able to:
1. Describe the purpose and content of the enhanced management approach
2. Understand the relation of the EM approach to current procedures for managing community health products

Time: 40 minutes

Materials:
Flip chart, markers, LCD, laptop

Handouts:
EM Standard Operating Procedures

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. Problems with Regular Supply of Community Health Products	Brainstorm	10
3. Introduction to the EM Approach	Lecturette	15
4. Relation of EM Approach to Current Procedures	Lecturette/Group Discussion	5
5. Session Conclusion	Participant Recap of Key Points	5

Learning Activities:

1. **Session Introduction – Lecturette – 5 minutes**
Explain that in this session participants will learn about the EM approach, the purpose of which is to support team-based problem solving to improve regular supply of health products at the community level. They will also learn how this approach relates to existing reporting and problem-solving procedures of the MoH.

2. **Problems with Regular Supply of Community Health Products–Brainstorm– 10 minutes**
Ask participants to brainstorm reasons that community health products may not be regularly available at the HSA level for community use. Write responses on a flipchart.
<u>Possible answers:</u>
    - Failure to report and request resupply in a timely manner
    - Lack of stock at the health centre level
    - Failure by district to respond timely to stock outs at HF
    - Lack of broader appreciation on value of maintaining adequate stocks at HSA level by different levels of players
    - Poor coordination and communication of product needs
    - Others…

3. **Description of the EM Approach– Lecturette/Group Discussion – 15 minutes**
Explain that the Enhanced Management approach is a set of procedures that are being rolled out in Districts to improve the supply chain for community health products in Malawi. Explain that this approach has been approved by the Ministry of Health and partners, based on evidence from a pilot conducted in three districts of Nsanje, Kasungu, and Nkhotakota districts over a period of 1.5 years. The evaluation demonstrated improvements in the supply chain for community health products in Malawi.

    Distribute the EM SOPs and ask participants to turn to and briefly review the overview of the EM SOP (Section I) and help generate a list of the key objectives of the EM intervention. Write the list on the flipchart. Be sure it includes the following EM objectives:
    - Promote and foster a team vision and commitment to ensuring the availability of community health products at all levels in the health system
    - Promote supply chain goal setting, performance monitoring, and recognition of superior performance to enhance effective team performance
    - Improve communication and collaboration among team members bound by a common goal
    - Promote the use of data to guide timely problem solving and decision making at district and lower levels to solve supply chain issues

    After discussing the objectives of EM, ask participants to read the **Core Features of the EM approach**. Spend a few minutes explaining what each means and that we will be learning about these features over the next two days.

    Using the brain storm list from the previous discussion, ask the participants if the problems identified can be managed using a team approach and objectives as designed in the EM approach, putting a check mark next to each of the identified problems.

4. Relation of EM Approach to Current Procedures– Lecturette – 5 minutes

Explain that, during the workshop, participants will be learning how to use information made available through cStock, a product availability information system that uses mobile phones. The workshop will also focus on a team approach to problem solving to ensure product availability. Since HSAs report on other data in addition to logistics data and cStock focuses only on logistics data, health workers at community level will continue to use the existing, paper-based Form 1A and related MOH procedures, to report on stocks of community health products and related case data.

Ask participants to give reasons why it is important to maintain both cStock and other existing paper-based LMIS forms:

Possible answers:

- Maintenance of district, regional, and national data systems
- Ability to verify data quality between the two tools and identify problem areas for supportive supervision and improvement
- Reference point in case of discrepancies
- Others…

5. Session conclusion – Participant Recap – 5 minutes

Ask a participant to summarize key points of the session, using the session outline as a prompt for main areas covered. Have other participants add to the summary, as needed, and fill in any gaps.

4. Roles and Responsibilities in Enhanced Management

Session Objective:

By the end of the session participants will be able to:

- Describe their specific roles and responsibilities in managing community health products according to procedures in the EM Standard Operating Procedures (SOPs)

Time: 60 minutes

Materials:

Flip chart, markers

Handouts:

SOP exercise for Small Group work

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. EM Standard Operating Procedures	Scavenger Hunt/Small Groups	45
3. Session Conclusion	Activity Type	10

Learning Activities:

1. **Session Introduction – Lecturette – 5 minutes**
   Explain that during this session, participants will review the EM SOPs and understand who is responsible for different roles related to supply chain management.

2. **EM Standard Operating Procedures – Small Group Scavenger Hunt – 45 minutes**

   Have participants use the SOPs to determine which of the statements included in the handout or parts of the statements are correct. They should be able to refer to a specific page in the SOPs to support their case. One question on the handout asks participants to match a specific responsibility to the person charged with completing that task. Once the participants have completed the questionnaire, review responses referring to appropriate sections in the SOPs.

   Note: There is a completed handout for the trainers' use, statements not included in the SOPs are highlighted in bold and italics and reference pages in the SOPs are given.

3. **Session Review and Link to Next Activity – Facilitator Recap – 10 minutes**
   Review the small group efforts in plenary, point out where correct information can be found in the SOPs. Tell participants that, in the next session, each district will identify its Product Availability Team and discuss mission and vision statements for its work.

TRAINER'S VERSION OF HANDOUT - ANSWERS

Use the SOPs to answer the following questions.

1. The **aim of the EM approach** ***(p.1)*** is to:
   "Significantly improve availability of medicines for community health at the HSA level through promotion of high team performance practices"

2. Which of the following statements is **NOT** an objective for EM: ***(p.1)***
   - Promote and foster a team vision and commitment to community health product availability among MOH staff at all levels of the product supply chain
   - Promote supply chain goal setting, performance monitoring, and recognition of superior performance to enhance effective team performance
   - Improve communication and collaboration among team members bound by a common goal
   - ***Provide mechanism for health centres to buy products locally when availability is low***
   - Promote the use of data to guide timely problem solving and decision making at district and lower levels to solve supply chain issues

3. Match the task in Column A with the person responsible for this task, in Column B. Use Section III of the SOPs to assist you.

A: Task	B: Person Responsible
1. Follows up with HSA supervisor on outstanding non-reporting HSAs.	1. HSA: (Task No. 4) ***(p. 13)***
2. Follows up with districts for non-reporting facilities.	2. HSA Supervisor (Task No. 4)***(p. 14)***
3. Act as the lead 'owner' and champion at MOH senior level for purposes of promoting successful implementation of the entire EM package, with cStock, in all districts	3. Health pharmacy In-Charge (Task No.1)***(p. 14)***
4. Provides feedback to individual HSA on products available for collection via cStock.	4. District IMCI Coordinator (Task No. 6) **(p. 15)**
5. Enters stock on hand (SOH) data of each product into cStock through SMS text message for all products registered in the application 2 days following the end of the month, before going to health facility to collect supplies.	5. Director – HTSS Pharmaceuticals (Task 3) **(p. 19)**
6. Use cStock data to correctly quantify community product needs, guide allocation of budget and inform procurement	6. Supply Chain Performance Management Officer (Task No. 2)**(p. 18)**
7. Meets regularly (monthly/quarterly) with Cluster	7. Cluster Supervisor

	Supervisors and district pharmacy in-charge to review cStock dashboard and supply chain performance reports, solve problems, and identify areas for improvement.		(Task No. 9) **(p. 15)**
8.	Enters data into Supply Chain Manager Database and reviews Supply Chain Manager Software for all facilities in the district at least once a month.	8.	DHMT (Task No. 6) **(p. 17)**
9.	Act as a link between facility DPAT and district by reporting problems HFs are unable to resolve to the District Coordinators or Management. Provides targeted supportive supervision to HSAs and HSA supervisors on supply chain related activities over and above other community health activities.	9.	District pharmacy in-charge (Task No. 8)**(p. 16)**

5. Forming District Product Availability Teams with a Goal

Session Objectives:
By the end of the session participants will be able to:

1. Identify their District Product Availability Team (DPAT).
2. Develop and document the team's vision, customer service mission, and respective member responsibilities in ensuring product availability and problem solving.
3. Identify people and committees that are important for communication / liaison purposes (e.g. DTC) and who on the team is responsible for linking with them.

Time: 120minutes.

Materials:
Flip chart, markers, LCD, laptop.

Prepared Flipcharts / power-point:
List of questions for small group work to form the Product Availability Team.
Diagram of vertical levels in the supply chain within the MOH (to be filled in).
Vision and Mission Statement from Kasungu, Nsanje, and Nkhotakota teams.

Trainer Preparation:
Prepare flip charts power-point presentation ahead of the session. Be sure to remind participants that these mission and vision statements will be shared with their teams at the HC/HSA training, so they should be sure to bring them that workshop.

Learning Activities Summary:

Title		Type	Time
1.	Session Introduction	Lecturette	10
2.	Forming the Product Availability Team	Small Group/ Presentations/Discussion	60
3.	Developing a team goal	Small Group	30
4.	Sharing the Team Goal with HF / HSA	Contest	15
5.	Session Conclusion	Activity Type	5

Learning Activities:

1. Session Introduction – Lecturette – 10 minutes

Briefly review Section II in the EM SOPs, which explains the constitution and purpose of the Product Availability Team. Ask participants what other work teams they participate in. Ask the possible advantages and disadvantages of working in teams.

Possible Answers:

Advantages
Group problem solving may be more effective than individual
Can mobilize necessary resources
Can motivate team members trying to resolve problems
Opportunity to share lessons and experiences

Disadvantages
Can be time consuming and inefficient
Some team members may be less active
If group does not contain right members (e.g. someone responsible for transport for resupply issues) may not be able to solve problems

2. Forming the Product Availability Team – Small Group/Lecture – 60 minutes

Explain that for supply chain management, the Product Availability Team needs to operate both **horizontally** and **vertically**. Staff who work together at a health centre, for instance, will form a horizontal team, as they are all in the same locale. For supply, we depend on the actions of others and good communication between different levels in the **vertical** health system.

Ask participants who they think must generally be included at the various system levels who can assist with product availability at the level below.

Fill in their responses on the flip chart.

National

District

Health Centre

Community

Divide participants into two groups distributing district (IMCI / Malaria / Family Planning / HTS / EPI Coordinators and district pharmacy in-charge), staff and cluster supervisors into each group. Tell them the groups will answer a series of questions and summarize their group discussion on flip chart paper. Have them appoint a rapporteur who will present the summary to the larger group at the end of the entire session. Have each group review Section III of the SOPs, which outlines roles and responsibilities by cadre. Answer the following questions, summarizing on their flip chart pages for plenary presentation.

- Are the roles and responsibilities listed in Section III correct for the staff configuration in your district? Specify the person(s) responsible for each task listed.
- Is there anyone else in your district (besides those you have already included) who should be part of your Product Availability Team; that is, someone who can help ensure product availability (e.g., member of district management team with budget oversight)? List those person(s) and their role.
- Are there other HC or district committees (e.g. DTC) with which the Product Availability Team should confer regularly? What are these and who on your team will be responsible for maintaining the link with each?

After 20 minutes, ask the groups to present a summary to the larger plenary group and ask others to comment or ask any questions.

3. Developing a goal for your team – Lecturette / Brainstorm / Group Discussion – 40 minutes

Refer participants to Section II.C in the SOPs on goals and performance targets.

Explain that the goal captures what a person or organization is striving to achieve (where it wants to be). Explain the components of a goal:

- Purpose.
- Identifies key target.
- Product/service offering.
- Goals and core principles for operation.

Present goals from the pioneer EM districts on prepared flipchart as good examples.

Sample Goals

EM Pioneer Districts: Nsanje, Kasungu, and Nkhotakota

Nsanje DHO:

Goal
All under 5 children in Nsanje district, especially those in hard-to-reach areas, should be able to receive quality medical services through a well-coordinated and optimized community case management programme.

Kasungu DHO:

Goal
'Kasungu district shall ensure that under-five children should not die of common illnesses which can be managed at community level due to lack of drugs and supplies'

Nkhotakota DHO:

Goal:
No child under the age of five in hard to reach in Nkhotakota district should die from common childhood illness due to lack of required heath products.

Given these examples, now we will create the goal for SCM for community health products in your district, bearing in mind that you have several health programs running at community level.

Divide the group into two and have them draft a goal (trainers should circulate to assist):

1. Draft a goal for your team that reflects what your team's most successful efforts would achieve in ensuring availability of health products after one year. (Refer them to the role of the product availability team in the SOPs [Section II.A.] for guidance in drafting the goal.)
2. Remind the participants they should consider the components of a goal above.

After twenty minutes ask each team to present its statement to the whole group and then have the participants work to combine the statements into one vision statement for the district.

4. Sharing the Team Goal with HF/HSA –Brainstorm– 15 minutes

Explain that this training will cascade to the HC staff and HSAs who will be on the frontline for reporting data and managing product resupply. Cluster Supervisors will be the link between the district and the HF by being present at both trainings. At HF level, we want the participant to “buy in” to the DPAT goal so they become co-owners and fully support its implementation.

Brainstorm with the whole group how they will go about selling the goal they have just developed, to ensure that the HC In-Charge, pharmacy in-charge, HSA supervisors, and HSAs in their district fully understand and “buy in” to the goal so they become co-owners and fully support its implementation. Write the ideas on a flipchart. Once all ideas are shared ask participants to come up to flipchart and put a tick mark next to the idea they like best. Once every one has voted, announce the winning idea.

Conclude by telling participants that it will be very important to obtain consensus from the HC-HSA team and agree on a final team vision and mission that will be used to guide the DPAT.

5. Session conclusion – Participant Recap – 5 minutes

Ask two participants to review the key points from the session, one focusing on forming the team and the other on the goal work. Answer any questions and address comments.

6. Introduction to cStock and Registering

Session Objectives:

By the end of the session, participants will be able to:

1. Describe the purpose of cStock
2. Register as users onto the cStock system
3. Describe the role of HF in-Charge, pharmacy in-charge and HSAs' supervisors in cStock, in timely re-supplying of HSAs with required products and their role in responding to stock outs of community health products

Time: 30 minutes.

Materials:

Flip chart, markers, LCD, laptop.
Participant mobile phones.
EM SOP Manual.
Problem strips in a basket, hat or box.

Trainer Preparation:

Trainer should make a copy of the problem strips found at the end of this session, cut them, fold them, and place them in a basket prior to the session.

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. Registering onto cStock	Demonstration and Practice	20
4. Session Conclusion	Summary and Q&A	5

Learning Activities:

1. Session Introduction – Lecturette – 5 minutes

Explain that one of the most important ways to manage the supply chain is to use timely and complete data to monitor and improve the supply chain. Tell participants that for the Enhance Management approach they will use cStock, an information system that receives and sends data through mobile phone SMS messages between the HSA and the HC regarding community health products and then displays analysed data through a web-based computer program.

Ask participants to turn to Section IV, page 22 in their SOP. Quickly review the information flow diagram. Explain in detail how the cStock system works, stopping frequently to make sure participants are following the discussion and fully understand how data flows in cStock. Thereafter, explain to participants that in this session they will be learning how to register in the cStock system. In the next session, we will go into more detail on the types of messages they will receive and the types of decisions or actions they would take in response to the messages.

Explain that while they are beginning to use the cStock system, the current paper based reporting system with the LMIS01-G and LMIS01-A /Form 1A will still continue to be used, since they also provide additional data over and above the logistics data that is available from cStock.

Ask participants how information gets into the cStock system. They should remember and say that data comes into the system through SMS messages from the HSAs. Refer participants back to the diagram of the cStock system in the SOP manual. Explain that while the data going into the system comes from the HSAs, that HSA Supervisors, Health Centre In-Charges, pharmacy in-charge, IMCI, EPI, Malaria and FP coordinators, pharmacy in-charge also receive information from cStock via SMS messages.

2. **Registering onto cStock – Job Aid Review and Practice – 20 minutes**
Explain to participants that in order to receive information from cStock they must be registered into the system. Ask participants to take out their mobile phones. First, ask participants to add cStock to their address books and to enter either of the following short codes as the cStock phone number depending on which phone service they use:
Airtel: 3838
TNM: 3838

Then ask participants to turn to the job aid on page 23 of the SOP called "Registering onto cStock."

Ask a participant to read aloud the top part of the job aid. Ask another one to read aloud step 1.

Explain that the cStock access code is a short code that allows the user to send cStock SMS messages without incurring any cost to the user. Since there are two possible phone companies in Malawi for this service, the code that you use to send a message should be the one for your telephone service.

Point out that the job aid instructions are divided into two parts – one for HSAs and the other for managers. Ask a participant to read step 2b for manager. When done, point out that when an HSA is registering, the first word in the message is "register" instead of "manage", and that the HSAs register with an ID number. Managers register with their role.

Before proceeding to the notes, point out a few things about writing formatted SMS messages to cStock:

- Messages can be written in small or capital letters
- There needs to be a space between each element in a message, commas are not necessary

Review the notes with participants. Then ask participants to register themselves in cStock.

As participants finish and receive their confirmation message, ensure that each participant has registered successfully.

Point out the job aid on De-Registering from cStock. Review the procedure, noting how easy it is. Ask those who do not need to be registered in cStock to de-register now (cluster supervisors).

3. **Session conclusion – Summary and Q&A – 5 minutes**
   Thank participants for their work and answer any remaining questions. Explain that in the next session, we will spend more time on cStock and they will have a chance to understand fully how cStock can help them in their work.

7. cStock Alerts and Nags

Session Objectives:

By the end of the session, participants will be able to:
1. Describe the role of HSA Supervisors, Health Centre In-Charges, pharmacy in-charges in cStock, in timely re-supplying of HSAs with required products, and their role in responding to stock outs of community health products.
2. Recognize and respond to alerts and nags received by SMS on their mobile phones

Time: 40 minutes.

Materials:

Flip chart, markers, LCD, laptop.
Participant mobile phones.
EM SOP Manual.
Problem strips in a basket, hat or box.

Prepared Flipchart / PowerPoint presentation:

SMS Alerts.

Trainer Preparation:

Trainer should make a copy of the problem strips found at the end of this session, cut them, fold them and place them in a basket prior to the session.

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
3. Nags and Alerts	Pairs Activity & Discussion	30
4. Session Conclusion	Summary and Q&A	5

Learning Activities:

1. **Session Introduction – Lecturette – 5 minutes**
   Tell participants that we will continue to discuss cStock. Ask participants if they can remember how information gets into the cStock system. They should remember and say that data comes into the system through SMS messages from the HSAs. Refer participants back to the diagram of the cStock system in the SOP manual. Explain that the data going into the system comes from the HSAs. HSA Supervisors, Health Centre in-Charges, pharmacy in-charges, district IMCI, EPI, FP, malaria coordinators and district pharmacy in-charges also receive information from cStock via SMS messages. Explain that we will discuss different nags and alerts in cStock which are messages generated by cStock.

2. **Nags and Alerts – Pairs Activity & Discussion – 30 minutes**
Ask participants in what situations they might want to be notified when an HSA has a supply problem. Take a few answers. Tell participants that with the cStock system, in addition to providing reports and identifying supply problems, the system will notify them when a supply problem that requires attention has occurred. It will notify them through SMS and dashboard alerts. Write the words **Nag** and **Alert** on the flip chart.

Explain that an **Alert** is a message that will come on your phone that reports when a serious supply problem has occurred. Write **Urgent Attention Required.**

Explain that a **Nag** is a message that will come on your phone that is a **reminder** of something for you to do. Write **reminder** next to the word Nag on the flipchart. For example, if an HSA forgets to send the stock on hand information to cStock, cStock will send a message to remind the HSA to report. Explain that after a few nags, the system will also send a nag to the HSA Supervisor and in some cases the District Program Coordinators.

Ask participants to open page 41 in SOP where one set of nags is described and ask them to read it. Note that these nags are sent to HSAs regarding reporting and point out there are other nags which remind them to collect products as described on page 43 of the SOP. Explain that there are also nags for HC staff reminding them to respond to a request. Explain that all the nags are around reporting and resupply and only the HSAs and HC staff will receive these nags, the participants in this workshop will not receive nags. Ask participants if there are any questions.

Now discuss Alerts. Explain that some of the participants here will receive alerts by SMS regularly. Explain to the participants that two alerts will be sent every second week to all Program Coordinators and to the district pharmacy in-charge. The two alerts are:

Prepared Flipchart / PowerPoint – SMS Alerts
- "% of HSAs in your district that have EOs that HC cannot resupply - visit the dashboard"
- "% of HSAs in your district are stocked out - please visit the dashboard"

Ask participants what an EO is? Make sure the answer is emergency order.

Ask participants to open the SOP on page 41. Now ask participants to remind you of the alerts that the cStock system will send to the Program Coordinators and to the district pharmacy in-charge phones. Explain that the idea of the summary alerts is to alert the coordinators that there are some SC issues at the community level and to remind them to go into the dashboard to locate the areas that are having difficulties and need support.

Remind participants that the alerts found in cStock give more details and highlight the following:

- Stock out of community health product at HSA that cannot be resupplied by Health Centre

- Emergency order of community health product at HSA that cannot be resupplied by the Health Centre
- When the HSA has registered but has not added the products they manage
- When receipts have not been reported by HSAs

Tell participants that they are now going to do a brief exercise on problem solving when they get an alert. Ask participants to find a partner. Tell participants that they are to take a problem strip from your basket, and spend 5 minutes discussing with their partner the action they should take to solve the problem. Distribute problem strips.

After 5 minutes, ask each pair to describe their problem and their solution to the problem. Discuss each and ask other participants to contribute or offer other solutions.

Explain that the alerts will be sent to all coordinators and the district pharmacy in-charge. However, in order to make sure that at least one person responds to the alerts it is very important to designate one person to follow up on alerts. Ask the group who they think should be nominated to have the responsibility of following up on alerts received by SMS by accessing the dashboard and locating the problem areas.

3. Session conclusion – Summary and Q&A – minutes

Remind participants that one of the advantages of the cStock system is that it helps track the availability of community health products and provides us with information to make decisions. It also helps warn us of any potential problems that might happen ahead of time by nagging us if reports have not been made in a timely manner and alerts us if there is a supply problem. Both of these are only as good as the actions we take after getting an alert.

Thank participants for their work and answer any remaining questions.

Problems to be cut into strips, folded and put into a basket, hat or box.

You are the HSA Supervisor at Chama Health Centre. Ruth Banda, the HSA who is farthest from the Health Centre, has not reported her stock on hand, and you have just received a "nag" that it is 3 days late.

You are the HSA Supervisor at Mposa Health Centre. Mary Msoya, HSA 2 picked up her community health products 5 days ago and has not reported the receipt. When you contacted her, she said her phone was not working.

You are the HSA Supervisor at Mpiri Health Centre. Jane Butao, HSA 4, forgot to report that she received her community health products 5 days ago.

You are the HSA Supervisor at Chulu Health Centre. Two of the six HSAs you supervise have not reported their stock on hand and they are already 5 days late.

You are the HSA Supervisor at Khola Health Centre. Sarah Shola, an HSA who you supervise, has not reported her stock on hand for 5 days. This is the second month in a row that she has been late.

You are the District IMCI Coordinator for Machinga District. You just got an alert that 25% of the HSAs in your district are stocked out.

You are the District IMCI Coordinator for Machinga District. You have just received an alert that 15% of HSAs in your district have EOs please check your dashboard.

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8. Homework Assignment

Session Objectives:

By the end of the session, participants will be able to:

1. Identify key learning points for the day
2. Review Enhanced Management SOP

Time: 15 minutes

Trainer Preparation:

Prepare flip chart of homework assignment.

1. **Trainer Review / Q&A – 10 minutes**
   Before using the workshop schedule and trainer's guide to do a summary of all key activities of the day, ask participants to note places where they are unclear or have questions. After you have completed the summary, take the questions and comments. Answer those that you can and consult for those you cannot. Briefly review the agenda for next day. Inform participants that they will learn to navigate the cStock dash board and those who have laptops should bring them along for practice.

2. **Homework Assignment – 5 minutes**
   Ask participants to review the SOP manual for homework and to do the following. Show flip chart of homework assignment.

Homework Assignment

Review the SOP manual. Write 3 questions on the content on strips of paper. Be able to answer the questions.

Note that in the morning they will have a chance to quiz their colleagues on the questions.

Thank participants for their participation today.

9. Introduction to the Day and Homework Review

Session Objective:

By the end of the session, participants will have reviewed content from the SOP Manual.

Time: 30 minutes

Materials:
Flipchart paper, markers

Learning Activities:

1. **Opening – 5 minutes**
   Briefly review the agenda for the day. Resolve any questions or issues that were pending at the close of the previous day.

2. **Q & A Homework and Review – Triad Activity – 15 minutes**
   Have a large group quiz where participants bring the questions they wrote down on strips of paper and place them in a hat/box. Ask volunteers to come up and pick a question to answer. If they are unable to answer, they should pick someone from the group to answer. If there is a disagreement about the answer, they should look the answer up in the manual.

10. Monitoring Team Performance at District

Session Objectives:

By the end of the session, participants will be able to:

1. Describe the purpose of the cStock dashboard and the information found on it.
2. Access and navigate the cStock dashboard for a district and the information found on it and identify health facility and HSA reports.
3. Describe the purpose and information found in the dashboard reports: Reporting Rates, Stock Status, Consumption Profiles, Alert Summary, Resupply Quantities Required, Lead Times, Order Fill Rate, and Emergency Orders.
4. Interpret dashboard reports appropriately and identify performance issues / problem areas, and guide necessary actions to betaken.

Time: 105 minutes

Materials:

Flip chart, markers
Computer with internet access
Computer projector / LCD
Participant mobile phones

Handouts:

Example of cStock dashboard (if necessary)

Prepared Flip Charts / PowerPoint presentation:

cStock website address – cstock.jsi.com
District Dashboard Questions

Trainer Preparation:

Be sure all participants have valid cStock usernames and passwords to access the dashboard.
Carry extra laptops for participants to use during the cStock dashboard sessions.
Be sure to carry dongles in case wireless access is not available.
Prepare flipcharts ahead of the training**.**
Set up the computer and projector. Test them prior to the session and ensure that internet access is available.

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. Logging onto and Navigating cStock	Demonstration & Limited Practice	30
3. cStock Dashboard	Demonstration, Pairs Work & Discussion	20
4. District Reports	Demonstration and Navigation Practice	45
5. Session Conclusion	Summary	5

Learning Activities:

1. **Session Introduction – Lecturette – 5 minutes**
   Explain that cStock system has a dashboard component that can be viewed over the internet by district and central level staff. Tell participants that in this session they will learn to use the web based cStock dashboard to monitor and assess supply chain performance for their community health programs.

   Explain that most often, it will be the job of the District Program (IMCI, Malaria, EPI, FP, or HTS) Coordinators, or the pharmacy in-charge to access the cStock dashboard. However, where resources permit, it will be beneficial if cluster supervisors also have the opportunity to access the cStock dashboard for the HPAT at HF level. The cluster supervisors can print, and make available health facility reports to be used at the monthly HPAT meetings. At district level, printing may not be necessary if program coordinators, pharmacy and HMIS staff are able to project cStock using an LCD projector during DPAT meetings at district level.

   Ask participants to turn to page 41 in the SOP. This section provides guidance using cStock dashboard to monitor community health SC performance in your district. Give participants two minutes to read the first page.

2. **Logging onto and Navigating cStock – Demonstration and Practice – 30 minutes**

   Explain that you will now provide them a tour of the dashboard. The facilitator should log in and project the dashboard live if possible using the LCD projector. Ask participants to watch as you give a brief tour of cStock. Ensure them that they will have a chance to explore the reports and places in the cStock.

   (Facilitator demo only)

Explain what is on the screen when you first log into cStock. Note the following (Do not drill down into each at this time; just briefly describe what is behind each of the top row tabs).

Top Row Tabs

- Dashboard – Ask participants what a dashboard is. You may want to relate it to the dashboard in a car, which gives a summary of the car's activity of performance. Note that the dashboard has front page, summary reports and 8 more detailed reports accessed through tabs that we will look at. These reports comprise the second row of tabs on the dashboard.
- HSAs tab – where you can find specific information about each HSA registered in cStock in your district.
- Health Facilities tab – where you can find information about the performance of HSAs who are associated with specific health facilities in your district.
- User Profile tab – where you can find contacts and similar information about staff in your district registered in cStock.
- Help tab – where you can find the contact information for the cStock system administrators.

Explain that since participants are district users of cStock, when they log into cStock they can get information about the HSAs in their own district. They can also get summary information about the performance of all the districts and all the HSAs in the country who are registered on cStock.

Explain that you will give them a chance to explore cStock dashboard. Divide the participants into as many groups according to the number of laptops (Cluster supervisors may need to be paired with district staff).

Once everyone is settled in groups, ask them to open page 39 of the SOP which contains the job aid for *Logging onto the cStock Dashboard*. Ask one participant to read the first step in the job aid. Now point to the flipchart that contains the website address – cstock.jsi.com. Ask everyone to open their laptops and to find the website using Firefox or Google Chrome. Help any participants that do not have Firefox or Google Chrome to download one of these browsers. Once everyone has found the website ask participants to log into cStock using their own login details. Tell them that they will each have their own unique log in and should have been given this before the session. Ask them to let you know if they don't have login IDs. Facilitators should circulate in the room until everyone is logged into cStock. It is essential to make sure no one is left behind.

Demonstrate how to login and ask participants to follow along on their own laptops.

Ask everyone to go the Site drop down menu, choose your district and hit the go button. Ask how the information changes. Note that the information changes to be for the whole district, for all HSAs registered in cStock in the district. For example, the stock out rate at the top left is now for the facilities in the district. Ask participants how they might use the information in the district view of the dashboard. Explain that central level managers use the Malawi view as well as district views in cStock to get information about the community level supply chain.

Ask participants to go to the site drop down menu again and choose a facility under their district. Note that the information they are now seeing is information about all the HSAs who are registered in cStock and are resupplied by that facility.

Ask participants to return to their district view.

Ask participants to turn to page 39 in the SOP. Ask them what has remained the same no matter where they are in cStock. They should note the static table, Current National Picture. Ask for participants to find the description of the Current National Picture in their SOP (page 39). Ask a participant to read aloud the 3 parts of the Current National Picture report. Ask them how this information might be helpful and discuss briefly.

Now we will take a quick look at User Profiles and Help Tabs. Project and click on the **Users Profile tab**. Point out the information for the health facilities, the name and contact information of the In-Charge. Then click on a specific facility and point out the HSA contact information, the supervisor for the HSA and the contact information.

Click on the **Help Tab** and point out that this tab has contact information for the system administrators should they have any problem with cStock. Note that they can access a User's Manual for cStock through this tab that provides basic information about navigating through cStock and the reports. Explain to participants that this manual provides a lot more details than the EM SOP and can be used by those who would like to know more about cStock. Tell them we will not be referring this document during this training but they should know it exists.

Printing and Exporting in cStock

Explain to participants that it is possible to print and export data from cStock. Demonstrate on the dashboard how to use the browser to print the page.

Now go to Reporting Rates under the dashboard and point out the CSV icon on the "Average reporting rates (facilities)" table. Explain that participants will see that icon on almost every table in cStock and it is what enables you to export data from the table into Excel. Click on the CSV icon. Note that Excel is launched and the data is put in an Excel workbook. Show this on the projected screen. Point out that the file name has a .csv extension and must be saved with an .xls extension to be useful. Demonstrate saving as an .xls file. Note that the data is now easily used in other documents such as Word documents or can be manipulated.

3. cStock Dashboard – Demonstration, Pairs Work & Discussion – 20 minutes

Take about 5 minutes to describe the four reports that are found on the cStock district dashboard. Remind participants that the information in the dashboard is based on the most recent month's report. Use the SOP as a reference for describing the dashboard, ask participants to look at the section called *The cStock Dashboard* on page 39.

Ask participants in their groups to answer the following questions - display the flipchart / PowerPoint presentation prepared before the session called *District Dashboard Questions*. Ask participants to spend about 5 minutes answering the question based on looking at the district dashboard only. If there is no internet use Nkhotakota dashboard (SOP handout 8) to answer the questions below.

District Dashboard Questions

1. How many of the facilities in your district have HSAs with no stock outs?
2. Which facility in your district has the most HSAs reporting on time?
3. Which facility in your district has the most HSAs reporting completely?
4. What % of facilities in your district received emergency orders they cannot fill?
5. What % of HSAs in your district are stocked out of LA 1x6?

After 5 minutes ask a participant to offer their answer to one question only and show the place on the dashboard where the answer for that district can be found. Answer any questions participants may have and discuss the four parts of the dashboard as needed. Refer to the SOP to help participants find answers to questions they may have.

Summarize by reminding participants that the dashboard summarizes the most recent month's information reported by HSAs and analysed by cStock.

4. District Reports - Demonstration and Navigation Practice – 45 minutes

Explain to participants that we are now going to spend the rest of the time looking at the 8 different reports that are linked to the district dashboard.

Project on the LCD the first report - Reporting Rates. Ask participants to focus on the projected image so that you can explain some key features. Explain that they will be able to explore on their laptops. **Participants should not be touching their computers during this demonstration.**

Review the report pointing the following key points.

Reporting Rate –

- Point out that the report can be for all the HSAs in the district or for a specific facility.
- Note how to select a date range for the report
- Be sure to point out that the green line on the graph indicates reporting completeness that is what percent of HSAs reported on all the products that they manage.
- Demonstrate that when you are in district view, the bottom report (Average Reporting Rates), is the reporting rate for all facilities in the district. When you are in a facility view, the reporting rates are for individual HSAs not a percentage. This shows the number of reports expected from the HSAs and their performance in timely reporting and completeness.
- After explanation of the report, ask participants how they might use this information.

Now ask participants to divide into groups according to the number of computers to review the 5 key reports. Ask them to spend 20 minutes looking at the different reports using the SOP to understand what data the report is presenting. Ask participants to think about the information and then note down how they might use it in monitoring the SC performance. As the groups are discussing, facilitators should circulate in the room and answer any questions or explaining the different reports where participants seem confused.

After 20 minutes, ask each group to share some of their ideas on how the information could be used.

5. Session conclusion – Summary and Q & A – 5 minutes

Ask participants what they liked best about the cStock dashboard and which report they think will be most useful. Explain that in the next section we will go into more detail on specific reports that will be useful to use routinely at DPAT meetings.

Thank participants for their work and answer any remaining questions. Refer participants to the SOP to answer their questions as well to reinforce the use of the SOP.

11. Monitoring Team Performance at HC

Session Objective:

By the end of the session, participants will be able to:

1. Describe the purpose and the information found in the five reports on the Health Facilities tab.
2. Describe how to print reports and export cStock data to Excel.
3. Use the Health Facility Reports Job Aid to teach someone to use Health Facilities Reports.
4. Explain how to use the information found in the Health Facility Reports and Resupply Worksheets to evaluate supply chain performance and identify possible actions to take.

Time: 60 minutes.

Materials:

Flip chart, markers
cStock SOPs for reference
LCD projector
Laptop Computer (s) – ask participants to bring their own if they have one
Internet Access

Handouts:

Health Facilities Report (example from cStock)
Health Facilities Report Data Exercise

Learning Activities Summary:

Title	Type	Time
1. Overview of Health Facilities Report	Interactive Demonstration	10
2. Practice with the Health Facilities Report	Exercise & Discussion	20
3. Using Re-supply worksheets to assess a Health Facility's performance	Small Group Work& Discussion	25
4. Conclusion	Q&A and Summary	5

Learning Activities:

1. **Overview of Health Facilities Report – Interactive Demonstration – 10 minutes**
   Have the main dashboard view on the screen. Note that during the rest of the workshop participants will be looking at the remaining tabs in cStock – HSAs, Health Facilities, User Profiles and Help.

   Click on the Health Facilities tab and ask participants to do the same. Point out that they will see the name of their facilities in the site box.

   Ask participants to click the site drop down menu and ask them what they see. They should say the name of all the facilities in the district.

   Ask them to click the name of a facility, and to choose the month of April 2013. Facilitator should do the same. Explain that this report provides information for all HSAs who are resupplied by that facility, and that the data is shown by month.

   Explain that the Health Facility Report has a special print button so it is not necessary to use the print function in the browser. Demonstrate on the projected image where the print function is located on the upper left side. Explain that we have printed a version from cStock for us to use during this session. This is the printed version that should be distributed to HFs every month for use during their HPAT meetings.

   Ask participants to find the handout 6 in SOP **Sample Health Facilities Report** (printed from cStock) and the Annex C in SOP **Health Facilities Report Job Aid**. Note that this job aid was created to help the user better understand the Health Facilities Report. Have different participants read aloud the sections of the job aid for each part of the report. Point out the parts of the report on the projected image of the report and refer them to the actual section of the report on their handout. Ask participants to briefly look at the reports and ask questions they might have. Do a quick review of the column headings for the reports.

2. **Practice with the Health Facilities Report – Exercise & Discussion - 20 minutes**
   Tell participants that they are now going to practice using the Health Facility Report. Ask participants to findhandout5 Health Facilities Report Data Exercise. Ask participants to use the printed report already provided to them and the job aid to have them answer the questions in the exercise. Tell them they have 15 minutes to complete the exercise. Ask participants to also note one good point, one area for improvement based on the information they located, and what they would do to address the area needing improvement.

   After 15 minutes ask participants to provide answers and answer any questions they may have about the report. Then ask each group to offer one good point, one area for improvement based on the information they located, and what they would do to address the area needing improvement. Take one answer from each group until all have had a chance to contribute.

(The questions are at the end of the trainers guide.)

As mentioned previously explain again that in the first week of each month, the pharmacy in-charge, Health Centre in-charge and HSA supervisor at each HC will need to convene a HPAT Meeting with all HSAs at their facility to review their performance and agree on what areas need improvement. Such meetings will require the Program Coordinators or Cluster supervisors to send a printed copy of cStock HF performance report to each facility to provide them feedback on their previous month performance, and where possible, cluster supervisor's attendance at HF HPAT meeting within their area of responsibility would be highly desirable. Explain also that the HF will then be required to use such cStock print out reports to identify their strengths and areas that need improvement; develop action plan to address any weaknesses and move forward. This is one way that HPAT will be able to facilitate achievements of their vision for improving product availability.

Tell participants that they are responsible for providing the Health Facilities with Job Aids and teach them how to use the report to help them improve HSA performance.

3. **Using Re-supply Worksheets to assess a Health Facility's performance – Small Group Work& Discussion – 25 minutes**
   Explain that sometimes districts may have limited resources and not be able to print and distribute cStock reports for HF to use to monitor HSA performance and problem solve. Explain that an alternative document that can be used at HF level is the Resupply worksheet.

   Ask participants to find the example of resupply worksheet, handout 9 in SOP, and a blank copy of the Resupply Worksheet Key Performance Indicator (KPI) Guide, handout 10. Refer participants to Section VI b in the SOP (page 46) which contains a job aid on how to use the Resupply Worksheet Key Performance Indicator Guide. Go through the first two rows of the job aid explaining how they should calculate the KPIs.
   Now divide the participants in to groups and ask the groups to use the resupply worksheet to calculate the KPIs and then identify what is going well and areas that need attention or improvement. After 15 minutes, ask each group to share one thing they found on the resupply worksheet that is going well and one that needs attention. End the session.

4. **Conclusion – Q & A and Summary – 10 minutes**
   Ask if they have any questions and answer if possible or consult. Encourage participants to use their SOPs to help them use cStock and to go on cStock dashboard frequently to help them better manage and support the HSAs in serving the community. Thank participants for their participation.

Health Facilities Report Data Exercise

Use the Health Facilities Report and job aid provided to answer the following questions.

1. For which product(s) are the most HSAs overstocked?
   Answer: **Pill Bags**
2. For which product(s) are the most HSAs under stocked?
   Answer: **Condom female**
3. Which HSA(s) are best at reporting?
   Answer: **Henderson Alufai, Lydia kunkean, Martin Misolo, mellody gent, obedi simbi, stella bote, wisted makhalanya**

4. Which lead time component needs the most improvement?
   Answer: **Order to order ready**

5. How many months of stock are there for all HSAs who are resupplied by this facility for zinc 20mg?
   Answer: **2.6 months**
6. What is the stock on hand of ORS for all HSAs?
   Answer: **185**
7. How many requests for male condoms did the facility received?
   Answer: **13**
8. For which product/s was the health facility unable to fill the order because of stock out?
   Answer: **Condom-Male, Cotton Wool, Pill bags**
9. Which product/s has the most emergency orders among all HSAs?
   Answer: **Condom-Male, LA 1x6**

12. Setting DPAT Performance Targets

Session Objectives:

By the end of the session, participants will be able to:

1. Set performance targets for their DPAT in order to move their performance towards meeting their vision, and develop a plan for achieving targets.

Time: 30 minutes

Materials:

Flip chart, markers

Prepared Flipchart:

Example of indicators and targets from other districts

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. Developing Performance Indicators and Targets	Lecturette/ Group Discussion And Consensus	20
3. Session conclusion	Participant Recap	5

Learning Activities:

1. **Session Introduction – Lecturette - 5 minutes**
   Explain to participants that in this session, they will develop and agree on clear performance targets which they seek to achieve in order to move towards achieving their goal. Ask participants if they can remember the goal they developed. Ask a participant to say the goal aloud to the group so we can remember what we are aiming for and display the flipchart.

2. **Developing Performance Indicators and Targets – Lecturette / group discussion and consensus – 20 minutes**
   Write SMART on the flipchart with the words - **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**ime-bound.

   Explain that at district level they will use the cStock dashboard to monitor their performance targets and at HF level they will use the HF report from cStock or the resupply worksheet. A performance target will have an indicator and then you will determine what your target is for each indicator.

   Ask participants questions based on the data available on cStock reports and resupply worksheet discussed in the previous session. What could their community supply chain indicators and targets be? These indicators will also likely be used at HF level which is why you should consider the resupply worksheet.

Take a few examples and note them on a flip chart. Keep that flipchart displayed visibly on a wall. Encourage the participants to set targets that enable their district to be a star performing DPAT, like the pioneer districts.

Display the prepared flipchart with examples of indicators and targets used in other districts (Use the indicators listed below to guide the discussion and to ensure the district comes up with a list of performance indicators that can be compared with other districts). For example, the district could identify the following indicators and set goals such as the ones below:

Examples of indicators and targets

Indicator	Target
% of HSAs that reported in the month	95%
% of HSAs that reported on time during the month	90%
% of HSA's whose reports were complete during the month	80%
% HSAs responded to by Facility with “Order Ready” after 2 days or more after receipt of order message	70%
% HSAs who collected order within 2 days after receipt of “Order Ready” message	70%
% HSAs who reported commodity receipt to c-Stock within 2 days of actual receipt of commodities	70%

Lead a discussion on what specific supply chain performance indicators the DPAT will want to measure itself on, and also clear targets that the DPAT would like to set for the next one year to improve availability of community health products. Remind participants that the targets should be set with a mind to achieving the District’s DPAT Goal.

Have participants reach consensus on indicators and performance targets for each of the indicators, so that each Health Facility can use as a benchmark to assess itself every month on how it is performing. Note the indicators and final agreed targets on flip chart. Explain to the team that at district level, DPAT could meet monthly or quarterly.

Ask the team to agree frequency of DPAT meetings at district level, and note it on the DPAT plan. Encourage the team to take advantage of any reviews or quarterly meetings that bring together HF and district staff, to discuss DPAT implementation and action plan on how to improve performance across community programs.

3. **Session conclusion – Participant Recap – 5 minutes**
   Inform participants that in the next session, participants will learn how they can effectively plan DPAT Meetings, use cStock [print out] performance reports, and manage and document DPAT meetings at both HC and district level for improved performance.

13. Planning and Conducting Effective DPAT Meetings

Session Objectives:

By the end of the session, participants will be able to:

1. Describe the purpose, content, and value of a DPAT Meeting.
2. Describe key preparations for an effective DPAT Meeting.
3. Use a cStock dashboard handout to set agenda for a DPAT Meeting and run a DPAT Meeting effectively
4. Model a DPAT Meeting that discusses key performance issues
5. Use a management diary to record actions taken to solve product availability and supply problems.
6. Identify how the diaries will be used in Product Availability Team discussions for monitoring and problem solving.

Time: 90 minutes

Materials:

Flip chart, markers.
Copy books for participants.

Handouts:

Sample completed entry into management diary.
cStock Dashboard report.

Prepared Flipcharts / PowerPoint:

Outline for entry into management diary.

Trainer Preparation:

Prepare flip chard / PowerPoint presentation ahead of the session.

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	10
2. Preparing and Setting An Agenda for a DPAT Meeting	Lecturette / Small Group Activity	30
3. Modeling DPAT Meeting	Lecturette / Group Activity	50
4. Using a Management Diary in Meetings	Lecturette	25
5. Session Conclusion	Trainer Recap	5

Learning Activities:

1. **Session Introduction – Lecturette – 10 minutes**
   Explain that this session will focus on understanding the purpose, content, and value of a meeting.

   Explain that for any meeting to be effective there is need for adequate preparations. Ask the participants if any of them have chaired / facilitated a meeting before. What preparations did they have to make in advance to ensure a productive meeting? Note down comments on a flip chart.

   Ask the participants to go to the SOP (p 48) and read the section on 'Preparing for an effective DPAT Meeting'. Compare with the answers already discussed.

2. **Setting an Agenda for a DPAT Meeting - Lecturette / Group Activity- 30minutes**
   Explain that the next step after preparing for the meeting is to set an agenda for the meeting. Ask participants what an agenda is, and why it is important.

   Review the section in SOP on setting relevant agenda for a meeting. Explain to participants that in setting the agenda they should review performance reports to identify issues for discussion during the DPAT meeting.

   Ask participants to find a sample printed dashboard for one district in SOP, handout 6, and have the team divide into 2 groups to practice interpreting reports and generating agenda from reports for a DPAT Meeting. Call back teams after 15 minutes and have each present its agenda and take comments while providing direction and any clarification as needed.

3. **Modeling a DPAT Meeting - Lecturette / Group Activity (45minutes)**
   Take 5 minutes to explain that we will practice how DPAT Meetings can be run in preparation for implementation of the EM approach. Explain that this modelling will help us build on and improve our meeting facilitation skills. It will also help us learn best practices from colleagues, so we can conduct better meetings at our duty stations and be better mentors to others.

   Remind the participants that they developed a goal and performance targets they intend to achieve and that the DPAT meetings are an opportunity to review the progress to achieving these.

   Explain that DPAT Meetings need to ***look back*** at what targets the team committed itself to achieve and what performance it has managed to achieve. ***Note any performance gaps and their source***. Knowing the source of performance gaps should lead the team to collectively find solutions to bottlenecks (ensure to involve any '*weak members that are contributing to performance shortfalls*' in generating solutions and commitment to improvement).

   Divide the team into 2 groups and ask participant to use the print out of the dashboards they received earlier. Explain that in the next 15 minutes each team should prepare to ‘stage up’ a DPAT Meeting. Ask the team to use an agenda prepared in the previous session and identify a Chair, Secretary, team members. They should then model a meeting using a team and performance improvement approach – which means they should use the data they have to identify the shortfalls and discuss possible solutions. Each team will run their meeting for 15 min. After the ‘stage up’ meetings invite participants to provide feedback to teams on areas of strength and those that require improvement. Give extra praise to any group that comes up with good solutions to the problems identified.

Ask participants if they now feel comfortable to plan and manage a DPAT Meeting effectively. Answer any questions they may have.

Explain that in the next session, we will learn and practice how we can document key follow up actions from DPAT Meetings in what is known as Management Diaries, to provide a record of key decisions taken, actions agreed on, and reference tool for monitoring progress on DPAT team self-improvement efforts.

4. Using Management Diaries in Meetings – Review of Sample Entry / Draft of New Entry – 30 minutes

Remind participants that in the previous session we learnt how to run effective DPAT meetings. Tell them that in these meetings SC areas for improvement will be identified and key decisions and actions agreed upon need to be documented for follow up.

Explain that in the enhanced management approach, management diaries will serve as a tool for recording supply chain issues raised, decisions taken, and follow-up actions required to monitor and improve performance in a systematic way.

DPAT at district level as well as HPATs at HF level should each use one copy-book. The secretary of the meeting is responsible for keeping this diary up to date, but all members should be able to access it.

The suggested outline for documentation in a management diary includes (Prepared Flipchart):

1. Date of team (or individual) meeting.
2. Review of previous meeting action plan:
    a. Action items addressed from last meeting.
    b. Result of action(s), if known.
    c. Actions still pending, reasons for non-implementation, and revised agreed action timeline.
3. Current problems / issues identified from present performance report.
    a. Proposed solutions/decisions.
    b. Action items before next meeting and person responsible.
4. Date of next meeting and a call to act on agreed follow up action points before next meeting.

Explain that if this is the first meeting, Step 2 will not be included, but should apply in subsequent meetings. Review the handout that gives a sample entry completed by an HC supervisor.

Ask the participants if they have any questions or comments on the outline or example.

Drafting a New Diary Entry

Have the participants refer back to the discussion they had during the 'stage up' / mock DPAT meeting. Have them use the information they discussed during that session to write in their diary what actions would be needed to follow up on the areas for improvement, using the outline for a diary entry presented on flipchart and in the handout.

Have one or two participants share their entry for review.

Ask participants how they think the district team could use the diary as individuals and as a team so that they are clear on the way forward.

Answer any outstanding questions.

5. Session conclusion – Trainer recap – 5 minutes

Encourage participants to use and maintain the diary as it is an important management and monitoring tool that will both help with current supply chain issues and potential spill-over positively to impact other areas of program management at HF and district levels. Thank participants for their participation.

Example of How to Fill in a Management Diary Entry

Date of team (or individual) meeting:
Monthly meeting with HSAs, Aug. 11, 2011 at Central Health Centre.

Action items addressed since last meeting:
HSAs sent SMS for emergency resupply of amoxicillin when they were very low and HC could not resupply.

Result of action, if known:
District coordinated to send extra amoxicillin from HC 1 and HC 2 to my HC with low stock. HC received stock, called HSAs to pick up new orders.

Current problems / issues identified:
Storage at HC not big enough for HSA orders when they are packed.

Proposed solutions / decisions:
Clear empty boxes from space in the pharmacy to make room for storing packed orders.

Action items before next meeting and person responsible:
HSAs to clear empty boxes from pharmacy.

14. Recognizing and Rewarding Good Performance

Session Objectives:

By the end of the session, participants will be able to:

1. Explain the power of performance recognition in motivating staff towards achieving agreed performance targets, and explore various, inexpensive or no-cost ways to do so.
2. Develop and describe their plan for recognizing and rewarding good facility product-availability team, supply chain management and performance.

Time: 60minutes

Materials:
Flip chart, markers

Handouts:
Low or No-Cost Ideas for Recognizing Performance

Learning Activities Summary:

Title	Type	Time
1. Session Introduction	Lecturette	5
2. What Motivates Workers?	Brainstorm	15
3. District Plan for Performance Recognition	Small Group/Plenary Summary	35
4. Session Conclusion	Trainer Comments/Participant Feedback	5

Learning Activities:

1. **Session Introduction – Lecturette – 5 minutes**
   Explain to participants that development of the DPAT Goal and performance targets and conducting of DPAT Meetings are necessary but not in themselves sufficient to achieve optimum performance in community-level supply chain management. Tell them that it takes a well-motivated team to direct their individual energies in a manner that sufficiently aligns their actions with team goals, hence the need to promote motivation through recognition of best performing staff and facilities. Ask the participants what they perceive as the difference between rewards and recognition. Explain that in this context we will consider recognition as a verbal or written recognition for good performance and that rewards involve some kind of gift or financial incentive. Explain that this session will explore and identify ways that supervisors and managers can recognize and reward staff within system resource constraints.

2. **What Motivates Workers? – Brainstorm / Discussion – 15 minutes**

Management research has shown that there are multiple factors that motivate workers. Have participants brainstorm a list of what they think some of these factors are. Make sure the factors on the following list are included

Factors that Motivate Workers

- Compensation: not only amount of pay, but growth potential and equity with other workers in the system.
- Meaningful work
- Being significant member of a team
- Praise
- Recognition
- Possibility for advancement

Explain that where pay is low, especially with volunteers, recognition other than money becomes increasingly important.

In addition, it is important not only to recognize high levels of performance (e.g., low frequency of stock-outs), but proactive problem solving and performance improvements. For instance, low frequency of stock-outs may have more to do with geographic accessibility and other factors than high achievement in worker performance.

3. District Plan for Performance Recognition – Small Group / Plenary Discussion – 35 minutes

Ask participants to find handout 11 in SOP (**Low or No-Cost Ideas for Recognizing and Rewarding Good Performance)** and ask participants to add other ideas that might be missing.

Divide the participants into 3 or 4 teams and ask them to spend 10 minutes making a plan for recognizing good performance that is practical for their district. After 10 minutes ask the participants to reconvene and present their plans in plenary. After each have presented, highlight where there were common ideas across the groups and discuss any ideas that participants feel will not be practical.

Emphasise that all the agreed ideas should be put into practice when they return to their workstations. A copy of these plans will be shared with them so they can refer to them and for Cluster Supervisors to share with HF staff.

4. Session conclusion – Trainer Comments and Feedback – 5 minutes

Before closing, remind participants that there are multiple factors that affect worker motivation. Pay is important but not the only motivating factor.

This session has focused on how proactive planning by managers and supervisors to **recognize best performance** can promote motivation for both the staff being recognized as well as their colleagues who will also be motivated to do better next time and be recognized.

Ask for any questions. Thank participants for their participation.

Handout

Low or No-Cost Ideas for Recognizing or Rewarding Good Performance

Performance to Recognize

- Accurate, complete, and consistent timely reporting.
- High responsiveness to HSA re-supply/product collection (lead time).
- Timely reporting of EO by HSAs and timely response by HF to HSAs' reported emergency orders.
- Improving trends in all of the above.
- Consistency in conducting DPAT Meetings by HF leadership.
- Other?

Possible Ways to Recognize Workers

- Official letters signed by DHO acknowledging consistent superior performance.
- Mentions in:
    - Newspapers?
    - Newsletters?
    - Public settings, such as in worker's community, at health facility where worker is employed or visiting for resupply.
- Award Certificates (especially when presented in public).
- Worker of the month public display board (e.g. in DHO's office).
- Other?

Possible ways to Reward Workers

- Pins, bags, t-shirts, prizes, etc.
- Other?

15. Workshop Closing

Session Objectives:
By the end of the session, participants will be able to:
1. Complete a workshop evaluation.
2. Describe next steps after the District – Cluster trainingin EM package.

Time: 30 minutes

Materials:
Flip chart, markers

Handouts:
Workshop evaluation form

Trainer Preparation:
- If desired, organizers should invite, in advance, an appropriate MOH official to preside over the opening and closing sessions of the workshop.
- Have contact information ready for SC4ICCM/Partner/MOH staff who can assist with roll out.

Learning Activities Summary:

Title	Type	Time
1. Workshop Evaluation	Completion of Questionnaire	10
2. Next Steps	Discussion	10
3. MOH official closing and call to action	Remarks	10

Learning Activities:

1. **Workshop Evaluation – Completion of Questionnaire – 10 minutes**
   Ask participants to find handout 10 in the SOP, the workshop evaluation questionnaire. Ask them to tear out of SOP, complete it and hand it in.

2. **Next Steps– Discussion – 10 minutes**
   Remind the participants that the next steps in the program are to continue the cascade of training to the HC-HSA level. Cluster supervisors in this group should be prepared to participate in that training and all participants should be prepared to assist with rollout of the program. Remind the cluster supervisors, that they need to bring the goals and performance targets identified in this workshop to the HC-HSA workshop, as they will be discussing them with their team during a session in that workshop.

   If there are questions or issues that arise as roll out progresses, participants should contact project staff at the contact points given.

3. **Closing – Remarks – 10 minutes**

If appropriate, have an official from the MoH give closing remarks. Otherwise, this time can be used for any remaining questions or concerns.

Enhanced Management of Supply Chain for Community Case Management:
District and Health Centre Staff
Workshop Evaluation

1. Please rate how well you feel the workshop met the following objectives

Objective	**Rating** **1: not at all** **2: poor; 3: satisfactory;** **4: good; 5: excellent**	**Comments, including how to improve training related to this objective**
Describe the purpose of the EM approach and its relationship to the current procedures for managing community health products		
Outline the flow of product information in the cStock system		
Describe their roles and responsibilities in the management of community health products using the procedures as outlined in the EM Standard Operating Procedures (SOPs).		
Identify their Product Availability Team, the vision of the team, the customer service mission of the team, and the responsibilities of the team in ensuring product availability and problem solving.		
Access cStock, and identify product and facility information found through cStock		
Describe the dashboard alerts, how to interpret the alerts, and what actions they should take in responding to alerts.		
Print facility performance reports from the cStock and interpret the reports to identify good facility performance and specific facility problems with a focus on stock levels, reporting rates and timeliness, and order fill.		
Identify possible solutions to common problems related to product availability.		
Identify current facility and team supply chain performance, set targets for improved performance and develop a plan for achieving those targets.		
Plan for a DPAT Meeting, develop agenda, and run DPAT Meetings effectively		

Objective	**Rating** **1: not at all** **2: poor; 3: satisfactory;** **4: good; 5: excellent**	**Comments, including how to improve training related to this objective**
Use a management diary to record actions taken to solve product availability and supply problems.		
Develop a plan for recognizing and rewarding good team and facility product availability and supply chain management performance		

2. The most useful part of this training was:

3. The least useful part of this training was:

4. Comments: