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Trip Report

#0-247

Travelers: Mr. Ernest Petrich
INTRAH Consultant

Country Visited: Nepal

Date of Trip: February 26-March 22, 1986

Purpose: To provide technical backup support for accountant and storeskeepers workshops, provide leadership in curriculum and training materials revision, provide debriefings to key officials, and explore further technical assistance needs in financial management.

Program for International Training in Health
208 North Columbia Street
The University of North Carolina
Chapel Hill, North Carolina 27514 USA

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EXECUTIVE SUMMARY

The INTRAH consultant's trip to Nepal was for the purposes of providing technical backup to FP/MCH Project trainer teams in conducting workshops for accountants and storeskeepers of the FP/MCH project, to assist the trainers in further upgrading of curricula and training skills for use in subsequent workshops, and to provide guidance to the FP/MCH Project on further needs and strategies for upgrading financial management practices.

Accomplishments included provision of significant assistance in last-minute preparations for the workshops, retraining of trainers in training methods and in the management of workshop training activities, upgrading of curricula and procedures manuals used as curricula content materials, preparation of additional and more adequate training materials and aids, significant improvements in evaluation materials including pre/post-tests, and the development of a proposed follow-on project (supported by the Ministry of Health (MOH) and USAID/Nepal for further upgrading of the FP/MCH Project's financial management system.

The above accomplishments prepared FP/MCH Project staff to proceed with acceptable quality training workshops for upgrading the skills of accountants and storeskeepers and to begin serious implementation of program and activity level fiscal accounting and reporting practices which have been requested by USAID/Nepal and other donors, and which should now be achievable over the next six months without further external technical assistance.

SCHEDULE DURING TRIP

- Tuesday,
February 25: Mr. Ernest Petrich departed Nairobi, Kenya,
for Kathmandu, Nepal.
- Wednesday,
February 26: Mr. Petrich arrived in Kathmandu.
- Thursday,
February 27: Mr. Petrich met with Mr. Tiwari, Development
Oriented Research Center (DORC), to review
logistical arrangements for workshop, and
with FP/MCH Project trainers Messrs. Karna,
Kunwar, Khadka, Pradham and Singh to review
status of materials preparation for workshop.
Mr. Petrich then met separately with Mr.
Karna to review overall workshop arrangements
and coordination, and with Mr. Tiwari to
review logistical planning.
- Friday,
February 28: Mr. Petrich and INTRAH staff members
Mr. Raymond Baker and Ms. Maureen Brown met
with Mr. Jay Anderson, Assistant Health
Development Officer, USAID/Nepal, to provide
briefing on workshop plans and arrangements.
Mr. Petrich met with Mr. Tiwari to review
workshop arrangements and spent balance of
day organizing workshop materials.
- Saturday,
February 29: Mr. Petrich departed Kathmandu for workshop
site in Nepalganj. Upon arrival, he assisted
with selection and rental of workshop space
and reviewed workshop's first day activities
with trainers.
- Sunday,
March 2: First day of workshops for district
accountants and storeskeepers. Evening
session with trainers to review day's
activities and prepare for second day (see
Appendix C, Workshop Curricula Summary).
- Monday-Friday:
March 3-7: Workshops and evening trainers' review
session.
- Saturday,
March 8: Trainers prepared materials for next workshop
week.
- Sunday-Friday:
March 9-14: Workshops and evening trainers' review
session.

- Saturday,
March 15: Final workshop sessions. Mr. Petrich departed Nepalganj for Kathmandu.
- Sunday,
March 16: Mr. Petrich and Ms. Brown reviewed workshop experience. Mr. Petrich met with Mr. Tiwari to review experience with logistical arrangements for workshop. Balance of day spent preparing notes and materials for use during final week of assignment in Nepal.
- Monday,
March 17: Mr. Petrich and Ms. Brown met to review plans and arrangements for debriefing sessions scheduled for Wednesday and Thursday. Mr. Petrich met with Mr. Karna to discuss follow-on technical assistance needs in financial management, and later met with the senior accountants and Mr. Karna on the same topic.
- Tuesday,
March 18: Mr. Petrich visited British Embassy to obtain visa for next INTRAH consultancy in Kenya. Mr. Petrich met separately with Mr. Tiwari to plan logistical arrangements for debriefing session, with Mr. Karna to review debriefing session arrangements and agenda, and the senior accountants and supply managers to review follow-on technical assistance needs in financial management. Mr. Petrich then met with Dr. Khatri to review workshop results, plans for debriefing session and follow-on financial management technical assistance needs. He also met with Dr. David Calder, Chief, Office of Health, Population and Nutrition, USAID/Nepal, regarding follow-on financial management technical assistance needs.
- Wednesday,
March 19: Trainers' debriefing session (see Appendix F for agenda). Mr. Petrich and Ms. Brown met in evening to review debriefing status and procedures. Mr. Petrich prepared notes for next debriefing day.
- Thursday,
March 20: Trainers' debriefing session. Meeting with Dr. Khatri and trainers to review training status, future needs to improve training and future training schedules.

Friday,
March 21:

Trainers' debriefing session. Meeting with Mr. Tiwari to review future logistical and typing needs and reimbursements due. Meeting with Dr. Nils Daulaire, John Snow, Inc., at Dr. Calder's request to review financial management follow-on project proposal. Debriefing sessions with Dr. Khatri and Mr. Anderson.

Saturday,
March 22:

Mr. Petrich met with Messrs. Tiwari and Pandy, DORC, to review project administrative logistics, and with Ms. Brown regarding debriefing sessions. Mr. Petrich then departed Kathmandu for Bangkok, Thailand.

I. PURPOSES OF TRIP

The purposes of the trip were:

- A. To provide technical backup to FP/MCH Project trainer teams during the first series of workshops for district accountants and storeskeepers, for which curricula were developed during previous consultancy.
- B. To provide guidance and assistance to the training teams in carrying out the instructional design, and didactic and practice sessions of the workshops.
- C. To provide leadership during the trainers' debriefing session during which problems encountered, lessons learned, and changes that should be made in the curriculum were identified.
- D. To provide a verbal summary of the trainers' debriefing session to Dr. T.B. Khatri, Chief, FP/MCH Project, and to Dr. David Calder and Mr. Jay Anderson, USAID/Nepal.
- E. To discuss further financial management technical assistance and training needs with Dr. Khatri.

II. ACCOMPLISHMENTS

- A. Mr. Petrich assisted FP/MCH Project trainers make final preparations for the workshops including the identification of training materials and logistical arrangements that the trainers had overlooked. Later, during the debriefing session, he assisted them in preparation of a reminder checklist of "things to do" when preparing for future workshops.

- B. Mr. Petrich provided technical backup to the FP/MCH Project training teams during the actual conduct of the workshops including monitoring their daily preparation activities, their conduct of training sessions and daily trainer review meetings. To facilitate daily feedback from workshop participants, a questionnaire was written, translated into Nepali, and utilized at the end of each training day by workshop participants to indicate what they liked and disliked about each day's training experience, and what they hoped to experience on following day. During the first workshop week, Mr. Petrich served as group facilitator for the daily trainer review sessions, to demonstrate how such sessions should be conducted. This included how workshop participant feedback should be reviewed and utilized, review of trainer reactions and feedback to improve quality of the learning experience, and how next day planning should be done. At the beginning of each training day, trainers rotated in providing feedback to participants on their reactions from the previous day, and on the trainers' feedback about the previous training day.
- C. During the trainers' daily review session, Mr. Petrich carefully reviewed with the trainers what had happened that day compared to what should have happened. This provided an opportunity to reinforce the knowledge and skills gained (and forgotten) by trainers at their Training of Trainers (TOT) workshop. Since one of the lead trainers had not attended the TOT workshop and had not been exposed to experiential learning methods, daily review sessions provided an opportunity for this reorientation and training to occur.

- D. During the workshops, Mr. Petrich provided continuing evaluation, and individual and group counseling to the trainers for the purpose of strengthening their training skills and assisting them to function more as a "training team" by:
- rotating session assignments;
 - backstopping each other more effectively;
 - better utilizing the curriculum lesson plans to guide management of workshop activities;
 - better stimulating class discussion;
 - improving seating arrangements of participants;
 - more clearly explaining reading assignments; and
 - improving their own skills in querying the participants and giving feedback.

Such simple things as how to write with chalk on a chalkboard without making squeaking noises, how to write on a chalkboard while speaking to trainees, and how to accurately monitor participant involvement and performance were reviewed. Continuing reminders to focus on learning objectives when beginning and completing each session, and when evaluating results, contributed to the trainers' understanding and skills in automatically utilizing the learning objectives as the basis for each lesson, a process with which they became quite skillful by the end of the workshops. Counseling and repeated reminders prompted their shift from focusing on their own needs as trainers to the needs of participants. Their ability to "read" the participants, solicit

feedback, and modify training activities to better satisfy participant needs, improved markedly by the end of the workshops.

E. After the workshops, Mr. Petrich assisted the trainers in reviewing the problems encountered and the lessons learned during the workshops, and assisted them in:

- revising curriculum design, including lesson plans and methods;
- revising and/or completing portions of the procedures manual;
- revising and/or preparing other training materials and aids;
- revising the pre/post-test questionnaires for both accountants and storeskeepers; and
- preparing guidelines on logistical arrangements for future workshops.

F. Mr. Petrich also consulted with Dr. Khatri and other FP/MCH Project officials, and with USAID/Nepal staff, to help in defining additional technical assistance and training needs for further upgrading of the FP/MCH Project's financial management system, and assisted in the preparation of a draft memorandum describing these needs (see Appendix H).

III. BACKGROUND

Previous INTRAH visits to Nepal were reported in INTRAH trip reports 0-8, 0-35, 0-36, 0-53, 0-142, and 0-154. This visit is the first activity under Phase II of the INTRAH-FP/MCH Project for training financial accountants and storeskeepers. It was a follow-up to an INTRAH-conducted TOT workshop in September - October 1985, during which trainers were trained and curricula were developed for use during Phase II of the project. The training of district

level financial accountants and storeskeepers is considered essential for further development of a viable FP service delivery system in Nepal, particularly because of the highly decentralized nature of the service delivery system.

IV. DESCRIPTION OF ACTIVITIES

Pre-trip activities by the consultant were not required, except for a review of the trip's scope of work and previous INTRAH trip reports.

The initial two days in-country were spent reviewing the status of workshop preparation with FP/MCH Project staff and trainers, and with Development Oriented Research Center (DORC) logistics personnel. Upon learning about the lack of preparation, the consultant assisted with last-minute workshop arrangements. These included assistance at the training site in arranging classroom space, procurement of supplies, etc.

During the two-week workshops, each training day began with the consultant reviewing with the trainers what was to be achieved that day. During each workshop day, the consultant conducted continuing evaluation of training activities and provided feedback and assistance to the trainers as required. At the end of each training day, the trainers met to review the day's experiences and the written feedback obtained from the trainees at the end of that day. This daily trainer review meeting was led by the consultant during the first week; the trainers took rotating leadership roles during the second week of the workshop.

After the workshops, upon return to Kathmandu, the consultant met with Dr. Khatri to provide feedback on the workshop experience and to explore the need for further technical assistance in upgrading financial management practices of the FP/MCH Project. Subsequent discussions

were held with technical level staff of the FP/MCH Project and with USAID/Nepal personnel to develop a strategy and scope of work for follow-on technical assistance.

The final three days of the consultant's visit involved the implementation of a debriefing session with the trainers, to review lessons learned and upgrade the curricula, training materials and plans for future workshops. The consultant served as a group facilitator in achieving the debriefing session objectives.

The consultant's last afternoon in Nepal was spent in wrap-up sessions with Dr. Khatri and USAID/Nepal personnel, providing a final debriefing.

V. FINDINGS

During initial meetings with the financial management and supply management trainers three days before the workshops were to begin, the consultant learned that very little workshop preparation had been done by the trainers, contrary to previous agreements. Specifically:

- A. The procedures manual for logistics and supply management had not yet been completed, typed, reproduced, and would not be completely available for the beginning of the workshop. Some sections had yet to be written and the trainers planned to do this during the workshop. They had arranged to bring one of their typists to the workshop site for this purpose and to assist with typing handout and exercise materials, also not yet prepared.
- B. The procedures manual for accounting and financial management had been written, typed, and was in the process of being reproduced and bound, and would be ready for handout on the first workshop day.

- C. The pre/post-tests had not been reviewed and revised in collaboration with Mr. Regmi, the evaluation specialist assigned to work with the trainers. The original drafts had been sent to DORC for typing and reproduction.
- D. Supplies required for the workshops had not yet been fully identified and procurement requests had not been submitted to DORC by the trainers. This included the many different standardized government accounting forms needed for trainee exercises which had to be purchased in the marketplace.

At the last moment, it occurred to the trainers that they should have a six-foot by three-foot banner for the workshops and they rushed to get one made.

- E. Arrangements had not been made for use of training equipment; e.g., flipchart easels.
- F. The training site in Nepalganj had not been inspected and trainers were uncertain about classroom arrangements and lodging accommodations for the consultant and trainers.
- G. There had been no preparation of trainee materials including skills exercise instructions, worksheets and model answers, other than the few that had been prepared at last year's TOT workshop. The lesson plans had not been reproduced for trainees.
- H. Visual aids had not been prepared.
- I. The INTRAH Biodata and Participant Reaction Forms had been translated into Nepali by Mr. Regmi, the evaluation specialist. However, they had been submitted to DORC for typing and reproduction at such a late date that DORC had already translated,

typed and reproduced their own versions of both forms which proved to be inadequate in that the translations were not as accurate as required, which partly invalidated the responses.

- J. Lead trainer assignments for the various workshop sessions had not yet been assigned. Mr. Shrestha, head storeskeeper, who had not participated in the TOT workshop nor been involved in the curriculum design, was planning to serve as lead trainer of the storeskeeper training during the entire workshop.
- K. Mr. Mishra, head of financial management, and one of the three designated trainers for accountants, was out of the country and might not return or be available for the workshop.
- L. All the trainers were planning to leave the next morning for the workshop site in Nepalganj.
- M. DORC had not yet purchased workshop supplies, but would try and do so the next day (Friday) and have them transported to the workshop site on Saturday with the consultant and the DORC logistical support person, Mr. Pandey.

Upon arrival at the workshop site in Nepalganj, the consultant learned that:

- A. The only two classrooms that could be found were 30 minutes' walk apart; one at the medical college campus where nurse-midwives are trained, and the other at the Snelata Hotel. Upon inquiry, the consultant learned that an adequate classroom was available at the New Iberia Hotel located only 5 - 10 minutes' walk from the college classroom, so arrangements were made that afternoon to rent the classroom at the New Iberia Hotel and cancel the room at the Snelata Hotel.

- B. Mr. Mishra, head of financial management, arrived at the training site and would be available to assist with training for the first workshop week only. (He stayed the entire workshop upon realizing its importance and obtaining approval from Dr. Khatri, his supervisor.)
- C. The trainers had not yet agreed upon who would take team leader responsibilities for each of the training sessions, including responsibility for organizing the training materials and preparing the visual aids.

On the first day of the workshops, it was learned that:

- A. Contrary to the consultant's request, the trainers had not adequately briefed themselves on lesson plan requirements and schedules for the first day's activities, and had not clarified team assignments by filling in trainer names in the lesson plan as requested.
- B. Needed supplies for the first day's activities had not been brought to the classroom from the training center office where they had been temporarily stored.
- C. The classroom seating was set up lecture style and only at the consultant's request were chairs rearranged.
- D. Trainees had difficulty completing biodata forms because of typographical errors, poor translation and because the basic INTRAH Biodata Form does not accommodate the kinds of background information usually provided by accountants and storeskeepers.
- E. Only about 50% of the trainees had arrived in Nepalganj by the start of the workshops. By noon of the first day 75% had arrived, and by the end

of the day about 90% were present. This was attributed to the fact that invitations were late in being sent out and some trainees had several days' travel to get to Nepalganj.

- F. Name tags were unavailable despite a previous request by the consultant.
- G. Unsharpened pencils were handed out to trainees, but there were no pencil sharpeners (Mr. Pandey rushed out to buy some).
- H. Masking tape for newsprint visuals had not been procured, and visuals kept falling off the wall as the available scotch tape would not hold.
- I. The pre-test had many typing errors. No one had proofed the stencil before reproduction.
- J. Contrary to the consultant's request, the trainers allowed the trainees to group themselves close together in clusters when doing the pre-test and some blatantly copied from others without intervention by the trainers except at the specific request of the consultant.
- K. Group process exercises were mismanaged, creating confusion among trainees and wasting considerable time. By the end of first day, the trainers were a half-day behind in their training schedule.
- L. Trainers failed to use the lesson plan as a guide to their activities, and skipped important steps; e.g., trainee instructions.
- M. Trainee supplies and materials had not been packaged well, so as latecomers arrived, they sometimes were given only some of the supplies and materials others had previously received.

- N. Carrying bags for trainees to use in carrying their supplies and materials were not available as they had not yet been purchased by DORC.
- O. Trainers were not actively monitoring trainees, particularly when trainees were performing in small group exercises.
- P. Trainees appeared to lack interest and motivation in the training and were primarily concerned about their food, lodging and per diem.

During the first several days of the workshops it was learned that:

- A. The trainers had forgotten most of what they had learned at the TOT workshop held six months previously, particularly about training methods. There was a tendency to lecture rather than act as discussion leaders and questioners of trainees.
- B. Most of the trainees were lethargic, unmotivated, and unwilling to do reading assignments out-of-class.
- C. Some accountant and storeskeeper trainees lacked basic math skills and could not perform simple addition, subtraction and multiplication functions (remedial training in basic math was initiated by trainers).
- D. Most of the accountants had neglected to bring their pocket calculators and attempted to get the few with calculators to do all the work assignments.
- E. Trainers failed to use lesson plans as guides despite the consultant's repeated requests, including reviewing learning objectives with trainees before and after each session.

- F. Trainers failed to grade and score pre-tests to identify trainees' weakest areas of knowledge/skills, despite the consultant's requests.
- G. Trainers failed to give clear instructions to trainees on the various skills exercise assignments, resulting in some confusion and wasted time.
- H. Trainers lacked some visual aids and behaved as if they were very unprepared and uncertain of themselves, often keeping trainees waiting while they consulted among themselves on what to do next.
- I. Sessions were neither begun nor ended on schedule and trainers tended to ignore time schedules including monitoring of trainees to determine adequacy of time allocation for various exercises.
- J. At beginning of each day, trainers failed to adequately review trainee feedback received by them at the end of the previous training day.
- K. In summary, trainers did not respond to the consultant's requests for preparation and proper conduct of training activities.

After several days of poor quality training and refusal of trainers to respond to the consultant's requests, and after trainers began to receive very negative feedback from trainees, it was learned that:

- A. The consultant had to be overly assertive and highly authoritarian, even threatening, to effect change in the trainers' attitude and behavior.
- B. The trainers began to appreciate that pre-class preparation made training much easier and more effective.

- C. Trainers were willing to work late at night and early in the morning to better prepare materials and aids, and to study lesson plans to better prepare for managing the training activities.
- D. Trainers stopped acting like "bosses" of the trainees and began working with them as "helpers" and "colleagues".
- E. Trainers began using lesson plans as guides during training activities, getting trainees to follow along, even reading learning objectives and having discussion to clarify them.
- F. Trainers began looking forward to getting trainee feedback each evening at the end of the training day.
- G. Trainers were beginning to work together as a team, with individual assignments made prior to each session and the responsible lead trainer coming prepared with all materials and aids in readiness.
- H. Trainers graded and scored the pre-tests and identified trainees' weakest areas of knowledge/skill.
- I. Trainers began monitoring trainees and providing remedial assistance to the weaker ones, including those who continually attempted to copy the work of other trainees.

By the end of the first workshop week it was found that:

- A. Trainers were capable of being good quality trainers once they had their training materials and aids prepared and spent pre-class time in

- reacquainting themselves with lesson plan requirements and procedures.
- B. Mr. Shrestha, who had not received previous TOT training from INTRAH nor been involved in the curriculum design, was eager to learn more about experiential training methods and use of the lesson plans. He became the strongest advocate for the methods and the use of lesson plans as training guides. He discontinued lecturing and used questioning and discussion methods in knowledge transfer sessions, and encouraged his team members to also do so. He began rewriting portions of the logistics and supply management manual to incorporate more practical content and examples, and skills requirements.
 - C. The trainees began to show more interest and motivation as the trainers improved their performance. Some trainees began insisting on more time to do skills development exercises and less time on presentations and discussions. Homework reading assignments were more completely done. Trainees began to freely ask questions as trainers behaved less as "bosses" and more as "helpers".
 - D. Supervisors of district accountants and storeskeepers would need to be oriented to the new accounting and storeskeeping procedures being taught their subordinates.

During the second workshop week it was learned that:

- A. Trainers could identify weak or gap areas in the curriculum design and the content materials and began to record this information for later use in

improving the training, including resequencing some curriculum topics for more effective learning.

- B. Trainers critiqued each other in the daily review sessions with the consultant. This included a review of how the training activities were managed each day. There was noticeable improvement in the quality of training as trainers competed with each other to do a better job.
- C. Trainers had become particularly sensitive to trainee performance, assisting the weaker trainees and identifying a few trainees who did not have the ability to master the basic math skills essential to performance of storeskeeper functions. Their supervisors (district FP officers) were contacted by Mr. Shrestha to ask that replacements be selected for subsequent training.
- D. Most trainees were very motivated and actively participated in doing their homework reading and exercise assignments.
- E. Trainers and trainees alike seemed to be pleased with the progress being made.
- F. Logistical arrangements to provide drinks and snacks to trainees during the workshop day steadily deteriorated in relation to quality of food and timeliness of service. Fruit had been purchased in bulk days ahead of time to save money and became over-ripe, even rotten, by serving time. Dead flies were discovered in food, etc. Food was as much as one-and-one-half hours late in arrival, seriously upsetting daily training

schedules and making for unhappy trainers/trainees and difficulty in covering workshop topics adequately.

- G. Additional table workspace was found necessary for accountants working with large spread-sheets and more tables were obtained for their classroom.
- H. Trainees were unhappy over the per diem allowances for traveling to the workshop site as some had to travel via a more expensive Indian route to arrive at the workshops on schedule due to the workshops' short lead-time notice.
- I. Trainees and trainers alike expressed the desire that a special social activity be held towards the end of the workshops and there was general dissatisfaction expressed with the unavailability of USAID/INTRAH funds to support such an activity.
- J. The trainers were capable of administering the post-test to avoid participants copying one another's responses; however, it became obvious to them that the post-tests needed revision to more adequately assess knowledge and skills gained.
- K. The trainers and trainees were pleased with how much knowledge and skills development actually occurred during the workshops.

Upon return to Kathmandu after the workshops, in meetings with Dr. Khatri, it was learned that:

- A. He was pleased with the feedback he had received from his trainers about the workshops and how much progress they felt they had made.
- B. He supported the proposal that when trainees are found to lack basic skills, and when those skills cannot be upgraded to enable the trainees to adequately perform storeskeeper functions, those

- trainees should be replaced as soon as possible with personnel who have the basic skills required.
- C. He desired additional improvements in the financial management system to improve program management and to better satisfy donor agency requirements, specifically:
1. computerization in production of program and activity fiscal accounting reports to improve the accuracy and timeliness of the financial reporting system;
 2. some type of accrual accounting capability that would improve ability to manage cash flow so as to avoid negative cash flow problems; and
 3. some integration of program output data with financial and resource input data to provide better measures of efficiency and productivity which would help to improve program management.
- D. He requested the consultant advise him on how best to proceed with developing a proposal for the needed financial management improvements.
- E. He fully supported the proposed two-day debriefing session for workshop trainers when informed of the need to revise and upgrade curricula design, curricula content materials including procedures manuals, workshop evaluation materials and training aids. (He subsequently agreed to a three-day debriefing session, when informed that all required work could not be accomplished in the two days allocated.)
- F. He agreed to postponement of the next scheduled workshops for accountants and storeskeepers because the impending election would not provide adequate lead-time for sending trainee invitations, and because trainers needed several weeks to type, proof and reproduce revised

curricula and training materials, including manuals.

- G. He considered his highest priorities to be the upgrading of financial and program management systems, was happy with the quality of curricula and training being developed for accountants and storeskeepers, and indicated that he had some reservations about the quality of other training, particularly training being given by the regular FP/MCH Project training staff.

During the three-day debriefing session with trainers, it was learned that:

- A. Trainers had prepared good reminder notes during the workshops on what revisions they desired to make to the curricula and training materials, including manuals.
- B. Trainers seemed very aware of the initial deficiencies in their performance as trainers early in the workshops and how much they had improved during the workshops.
- C. Trainers were quick to identify workshop deficiencies during a brainstorming session which produced a list of lessons learned (see Appendix G).
- D. Trainers were willing to again put in long hours to make revisions in curricula and materials in order that they would be prepared for the next workshops.
- E. The revised products that trainers produced were of greatly improved quality, including the revised pre/post-tests.

During a debriefing review session with Mr. Tiwari and Mr. Pandy of DORC and the trainers, it was learned that:

- A. There was a willingness by DORC staff to change practices in providing logistical support to workshops, including arrangements for snacks and drinks during the workshop day, pre-purchase of workshop supplies in Kathmandu where supplies are normally available, translation of trainee vouchers into Nepali for easier use by trainees, and preparation of a list of standard rules and practices to be followed by trainers and trainees for logistical support arrangements, including per diems.
- B. DORC was willing to take responsibility for coordinating the typing, proofing and reproduction of the revised training curricula, handout/ exercise materials and evaluation materials.

During debriefing meetings with USAID/Nepal staff, it was learned that:

- A. They seem pleased that the consultant's visit, which began under such adverse conditions, due to MOH lack of preparedness, achieved as much as it did.
- B. They were extremely supportive of Dr. Khatri's desire to further improve the financial management system, but indicated that USAID/Nepal support would have to come via AID centrally-funded core contractors. They indicated a strong desire to utilize the John Snow, Inc. (JSI) REACH Project for technical assistance in financial management since JSI has logistical capability in Kathmandu with a project office there. Dr. Calder indicated he had a meeting with Dr. Khatri and informed him of USAID/Nepal's strong support and requested a

formal letter of request be sent from the MOH to USAID/Nepal for assistance (see Appendix H, draft request that the consultant assisted FP/MCH Project staff to prepare).

During a short meeting with Dr. Daulaire of JSI, which was held at Dr. Calder's request, it was learned that:

- A. JSI's REACH Project can only provide technical assistance to further upgrade financial management of the FP/MCH Project and that funds to support training are not available under the REACH Project.
- B. JSI will be pleased to receive a formal request from USAID/Nepal to assist with financial management improvements and will be pleased to utilize this consultant for such purposes, provided he is available.

During a final debriefing session with Dr. Khatri, it was learned that:

- A. He had informally received USAID/Nepal endorsement from Dr. Calder for the proposed financial management improvement request and was prepared to have the MOH send the formal request as drafted.
- B. He was pleased with the work that had been achieved by his accountant and storeskeeper trainers and believed that they could now function in a self-sufficient way to train the remaining accountants and storeskeepers this year.
- C. He indicated that there may be some need for the consultant's services next year in designing follow-on training for district level accountants and storeskeepers.

- D. He looked forward to working with the consultant in the further upgrading of the FP/MCH Project's financial management system and will advise the consultant directly if any problems develop in arranging for the needed technical assistance.

VI. CONCLUSIONS

- A. Despite the almost total lack of preparation for conducting the training workshops, they were implemented and, during the process of conducting them, the trainers learned the full value of being well prepared, and the value of using appropriate training methods.
- B. Unfortunately, the first group of trainees in accounting and storeskeeping were the lowest-quality groups from the remotest part of the country (western) who had to suffer through the trainers' mistakes the first week of the workshops, and as "guinea pigs" did not receive adequate training, particularly during the first week when the prerequisite topics of the curricula were covered.
- C. The pre/post-test assessments were not valid or reliable because of the poor quality of the tests, the poor administration of the pre-test, the copying on the pre-test, and inadequate instructions to trainees in answering multiple choice questions; therefore they cannot be utilized as a measurement of what was achieved during the workshops, specifically whether trainees attained an acceptable level of knowledge and skills to adequately perform their jobs. However, the revised pre/post-test should be a valid and reliable indicator for future workshops.

- D. The curriculum design was tested and strengthened during the workshops and during the three-day debriefing session and should now be of adequate quality to provide effective skills training for both accountants and storeskeepers.
- E. Training materials and visual aids were developed, tested, revised, and should now be of adequate quality and quantity.
- F. Deficiencies in logistical support arrangements were identified and alternative solutions were considered. The most feasible solutions were selected for implementation in support of subsequent workshops.
- G. The trainers had to relearn what had been taught them six months previously at the TOT workshop. The initial active resistance to being prepared, to using active learning methods, to planning and managing training activities, and to listening to the consultant's advice was overcome, but it took one full week of effort by the consultant and there are some questions remaining about the extent to which there may again be slippage in attitudes and methods before the next workshops.
- H. The consultant did all that a consultant should do to assist in curriculum design, training materials development and preparing trainers to be better trainers. There remains little excuse now for poor trainer performance in subsequent workshops to train accountants and storeskeepers.
- I. There remains some question as to whether district level accountants will be capable of maintaining fiscal accounts on an activity-specific basis due to their minimal skill levels and available time.

The system can be tested and if found not to be possible, district accountants can at least code all expenditures by activity account and activity-specific fiscal reports can then be prepared at the central level.

- J. Program-specific and activity-specific fiscal accounting should now be implementable country-wide as accountants receive their training in workshops scheduled for this year.
- K. Maintaining current values of stock inventory should also now be implementable country-wide as storeskeepers receive their training in workshops scheduled for this year.

VII. RECOMMENDATIONS

- A. The INTRAH Phase II Project for upgrading FP/MCH Project accountants and storeskeepers should proceed without further need for technical assistance.
- B. District supervisors of accountants and storeskeepers should be given a thorough orientation on the new accounting and storeskeeping procedures being followed by their subordinates, in order that there is supervisory accountability to ensure implementation and maintenance of the new system. Such orientation should be conducted by the designated trainers of accountants and storeskeepers at future staff meetings of district FP officers.
- C. Future workshops should not be held until all curricula and training materials have been retyped on stencils, stencils proofed, materials reproduced, and properly bound or packaged for use.

- D. The revised curricula for accountants and storeskeepers should also be used for induction training of new accountants and storeskeepers in lieu of having them sit at the central office for one or two weeks as observers. One trainer should be able to administer the course to five to eight new inductees without difficulty, whenever needed.
- E. On-the-job performance evaluation of accountants and storeskeepers can be easily conducted by measuring the accuracy and timeliness of reports prepared and submitted to the central office. Central staff should set up a matrix for recording and comparing before and after training performance and future performance trends, to identify those requiring additional refresher training. This was discussed by the consultant with the trainers and agreed to.
- F. Design of refresher training in subsequent years should not be difficult for the trained trainers, who now know how to write learning objectives and prepare lesson plans and training materials. Re-use of standardized skills training methods and materials is appropriate; therefore no additional technical assistance should be necessary.

APPENDIX A

LIST OF PERSONS CONTACTED

USAID/NEPAL:

Dr. David Calder, Chief, Health/Population/Nutrition Office
Mr. Jay Anderson, Assistant Health Development Officer,
Health/Population/Nutrition Office

MINISTRY OF HEALTH -- FP/MCH PROJECT:

Dr. T.B. Khatri, Chief
Dr. S.P. Bhattari, Deputy Chief
Mr. Ugra N. Karna, Administrative Officer
Mr. Govinda Mishra, Trainer and Head, Financial Section
Mr. K. Kunwar, Trainer, Senior Accountant
Mr. B.B. Khadka, Trainer, Internal Auditor
Mr. G.M. Shrestha, Trainer, Senior Supply Officer and Head,
Stores Section
Mr. G.S.B. Pradhan, Trainer, Procurement Officer
Mr. S.B. Singh, Trainer, Supply Officer
Mr. G.P. Regmi, Demographer

JOHN SNOW, INC. (JSI):

Dr. Nils Daulaire, Chief of Party
Ms. Barbara Lamphere, Program Officer

DEVELOPMENT ORIENTED RESEARCH CENTER (DORC):

Mr. Padma N. Tiwari
Mr. Lekh N. Pandey

LIST OF PERSONS CONTACTED (Continued)

Page 2.

PROGRAM FOR INTERNATIONAL TRAINING IN HEALTH (INTRAH):

Mr. Raymond H. Baker, Associate Director, Administration

Ms. Maureen T. Brown, Program Officer

APPENDIX B: LIST OF PARTICIPANTS AND TRAINERS

A.	<u>PARTICIPANTS - (ACCOUNTANTS)</u>	<u>Pre-Test</u>	<u>Post-Test</u>	<u>Difference</u>
1.	Padma Raj Joshi, Dist. Accountant	45	73.5	28.5
2.	Shatya Narayan Yadav, Dist. Account	39	75.5	36.5
3.	Khem Pratap Shen,, Dist. Account	45	66.5	21.5
4.	Shiddhi Raj Shrestha, Reg. Sub. Acct	54.5	69.5	15.0
5.	Chet Raj Upreti, Dist. Accountant	*51.5	37.0	-15.5
6.	Gauri Prashad Duwadi, Central Acct	38.0	60.0	22.0
7.	Prem Bahadur Prajapati, Central Acct	30.0	71.5	41.5
8.	Jagat Bahadur Kunwar, Reg. Acct.	*37.0	44.0	7.0
9.	Madhu Dhungel, Central Acct	54.0	82.0	28.0
10.	Rup Raj Sharma, Dist. Sub. Acct	*47.5	45.0	- 2.5
11.	Khem Prashad Shrestha, Dist. Acct	32.0	80.0	48.0
12.	Bhakta Raj Joshi, Dist. Acct	28.0	64.0	36.0
13.	Ram Udgar Yadav, Dist. Acct	27.0	61.5	34.5
14.	Tika Ram Rai, Central Acct	57.0	85.5	28.5
15.	Swami Dayal Kanbaziya, Trg. Centre sub. Acct	*26.0	16.0	-10.0
16.	Harish Kumar Karki, Dist. Acct	50.5	70.0	20.0
17.	Lal Bahadur Koirala, Dist. Acct	43.0	60.5	17.5
18.	Krishna Prasnad Sharma, Dist. Acct	52.5	74.0	21.5
19,	Arjun Kumar Shrestha, Dist. Acct	10.0	64.0	44.00
20	Shisir Rai, Dist. Sub. Acct	<u>49.0</u>	<u>68.0</u>	<u>19.0</u>
21.	AVERAGE	41.3	63.4	22.1
B.	<u>PARTICIPANTS (STOREKEEPERS)</u>			
1.	Netra Bahadur Thapa, N.G. Storekeeper-in-Charge	55.0	82.0	27.0
2.	Bhoj Raj Ne, Dist, Kharidar	*73.0	85.0	12.0
3.	Dilip Sing Thapa, Dist. Kharidar	50.5	71.5	21.0

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4.	Brija Lal Yadav, Dist. Kharidar	51.0	85	34.0
5.	Mohan Maskey, Dist. Kharidar	45.0	76.0	31.0
6.	Dil Bahadur Dahal, Dist. Kharidar	57.0	94.0	37.0
7.	Singha Raj Shrestha, Dist. Mukheya	*18.0	28.0	10.0
8.	Mitra Man Lama, Central Storekeeper	*70.0	79.0	9.0
9.	Sahadev Thapa, Dist. Mukheya	55.5	82.0	27.0
10.	Bhim Sen Magi, Reg. Mukheya	52.5	73.0	20.5
11.	Birendra Bahadur Sakya, Reg. Mukheya	*39.0	42.0	3.0
12.	Birendra Bahadur Malla, Trg. Centre Mukheya	*39.0	40.0	1.0
13.	Tika Datta Joshi, Storekeeper, Sub-Store	*54.0	62.5	8.5
14.	Prem Bahadur Thapa, Dist. Mukheya	52.0	88.0	36.0
15.	Gopi Lal Sharma, Dist. Mukheya	55.0	82.0	27.0
16.	Kamal Prasad Mishra, Dist. Kharidar	56.5	84.0	27.5
17.	Ram Prasad Paneru, Dist. Kharidar	*61.5	63.0	1.5
18.	Tulanath Yogi, Dist. Mukheya	<u>52.5</u>	<u>72.0</u>	<u>24.5</u>
	AVERAGE SCORE	52.0	71.8	19.8

C. TRAINERS

1. Ugra N. Karna, Administrative Officer
2. Govinda Mishra, Head Financial Section
3. Keshar Kunwar, Senior Accountant
4. G.M. Shrestha, Senior Supply Officer and Head, Stores Section
5. Ghana S.B. Pradhan, Procurement Officer
6. Surya B. Singh, Supply Officer
7. Ernest E. Petrich, INTRAH Consultant

*Inadvertantly allowed to copy from others on the Pre-Test.

APPENDIX C

WORKSHOP CURRICULA (ENGLISH SUMMARY):

- 1. ACCOUNTING**
- 2. STORESKEEPING**

APPENDIX C

A TWO WEEK TRAINING WORKSHOP CURRICULUM
IN
ACCOUNTING AND FINANCIAL MANAGEMENT

DATE PREPARED: OCTOBER 1985

PREPARED BY:
HMG MINISTRY OF HEALTH
FP/MCH PROJECT
KATHMANDU, NEPAL

IN COLLABORATION WITH:
INTRAH PROGRAM
UNIVERSITY OF NORTH CAROLINA
CHAPEL HILL, NORTH CAROLINA
U.S.A.

TRAINING PROGRAMME
FOR
FISCAL MANAGEMENT

1. Goal

To improve the knowledge, skills and attitudes of Accountants in order to perform their duties more effectively and efficiently.

2. Learning Objectives

Introduction to the Workshop.

Overall Objective: To acquaint the participants with the goal and objectives of the Workshop and to assess the existing knowledge and skills of the participants.

L.P. No. 2: Responsibilities and interrelationship of Accountants and Store-keepers.

Overall Objective: To make the Accountants and Store-keepers aware of their interrelationship and to develop and strengthen the sense of mutual cooperation between them.

L.P. No. 3: Introduction to His Majesty's Government's accounting and book keeping system.

Overall Objective: To make the participants more knowledgeable about different aspects of HMG accounting and book-keeping system.

L.P. No. 4: Budget Formulation and release procedures.

Overall Objective: To improve the capabilities of participants in preparing the budget and getting the budget released in time.

L.P. No. 5: Procedures of Budget Expenditures.

Overall Objective: To acquaint the participants with financial rules and regulations relating to budget expenditure.

L.P. No. 6: Book-keeping.

Overall Objective: To improve the capabilities of the Accountants in preparing "Goshwara Voucher", making postings in different daily ledgers and preparing monthly, quarterly and annual financial reports.

L.P. No. 7: Programmewise and activity-wise book-keeping.

Overall Objective: To make the participants able to prepare and maintain programme-wise/activity-wise financial records correctly.

L.P. No. 8: Logistic record in account section.

Overall Objective: To enable the participants to maintain programme-wise logistics record with monetary value of the items.

L.P. No. 9: Financial reporting system.

Overall Objectives: To make the participants more knowledgeable in order to strengthen the fiscal reporting system.

L.P. No. 10: Auditing.

Overall Objective: To improve and update the knowledge of the participants in different areas of auditing in order to strengthen the accounting system and make it more affective.

L.P. No. 11: Post-test/Workshop Evaluation.

Overall Objective: To assess how much the participants have learned from this workshop by making comparison of their pre- and post-test scores, and evaluate the whole workshop in terms of achievement against the set objectives.

LEARNING OBJECTIVES - FINANCELesson Plan No. 1

- 1.1 Identify and describe the necessity, importance and purpose of the workshop.
- 1.2 Given a prepared list of Questions complete a workshop pre-test in one hour.
- 1.3 Identify and discuss participant's backgrounds and experiences.

Lesson Plan No. 2

- 2.1 To develop a sense of team spirit and mutual cooperation by accomplishing a task collectively.
- 2.2 To list the main job functions of accountants.
- 2.3 To list the main job functions of store-keepers.
- 2.4 To explain the interpersonal and institutional relationship of accountants and store-keepers and its importance.

Lesson Plan No. 3

- 3.1 To describe the evolution of government accounting and book-keeping system in Nepal and its new accounting system.
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- 3.2 To list 7 purposes and 7 characteristics of the new accounting system.
- 3.3 To list and describe 20 forms prescribed by the Accountant General Officer for use in present accounting system.

Lesson Plan No. 4

- 4.1 To identify and explain five elements considered necessary for preparing a budget.
- 4.2 To classify the budget by different budget heads and to describe them.
- 4.3 To fill-out budget supporting forms and prepare the annual budget correctly.
- 4.4 To explain the process of budget release and the relationship of different agencies involved in the budget process.
- 4.5 To prepare the budget release forms appropriately and completely.

Lesson Plan No. 5

- 5.1 To identify and explain the 10 financial rules and regulations related to budget expenditure.

- 5.2 To describe the whole process of budget expenditure in sequential order by the agencies involved.

Lesson Plan No. 6

- 6.1 To explain 'debit' and 'credit' concept and procedures and identify terms used in transactions.
- 6.2 To describe cash receipt, petty cash voucher and petty cash reimbursement forms and correctly and completely demonstrate the ability to fill out forms.
- 6.3 To describe the general voucher form and demonstrate the ability to prepare this form correctly.
- 6.4 To describe how to maintain Bank Cash Book, budget sheet and other sub-ledgers.
- 6.5 To fill out Auditor General Forms Nos. 5, 8 and 22 correctly and completely.
- 6.6 To describe how to prepare and maintain monthly report forms.
- 6.7 To fill out monthly report forms correctly and completely.
- 6.8 To describe how to prepare Trimester/Annual Report Forms.
- 6.9 To fill out the Trimester/Annual Report Forms correctly and completely.

- 6.10 To prepare and recconcile the accounts and ledgers correctly.

Lesson Plan No. 7

- 7.1 To describe how to prepare and maintain the daily fiscal accounts by programs/activities.
- 7.2 To demonstrate the ability to prepare the program/activity-wise daily accounts correctly and completely.
- 7.3 To describe how to prepare program/activity-wise reporting forms.
- 7.4 To fill out program/activity-wise reporting forms accurately and completely.

Lesson Plan No. 8

- 8.1 To describe how to prepare and maintain stock records/program accounts.
- 8.2 To fill out program stock records and related supporting forms correctly.

Lesson Plan No. 9

- 9.1 To describe the reporting system and its importance.
- 9.2 To describe how many copies of what types of report forms should be sent to where, and when they should be sent.

Lesson Plan No. 10

- 10.1 To define and describe auditing, its purpose and necessity.
- 10.2 To explain the types and methods of auditing.
- 10.3 To describe how to maintain the record of uncleared advances/financial irregularities and how to get those advances/irregularities cleared and regularized.

Lesson Plan No. 11

- 11.1 Given a prepared list of questions complete a workshop post-test in one hour.
- 11.2 Given a prepared questionnaire complete a workshop evaluation in one hour.

A TWO WEEK TRAINING WORKSHOP CURRICULUM
IN
LOGISTICS AND SUPPLY MANAGEMENT

DATE PREPARED: OCTOBER 1985

PREPARED BY:

HMG MINISTRY OF HEALTH
FP/MCH PROJECT
KATHMANDU, NEPAL

IN COLLABORATION WITH:

INTRAH Program
University of North Carolina
Chapel Hill, North Carolina
U.S.A.

TRAINING PROGRAMME FOR
LOGISTICS AND SUPPLY MANAGEMENT

1. Workshop Goal:

To improve the knowledge, skills and attitudes of district store-keepers to make them able to perform their duties more effectively and efficiently.

2. Learning Objectives:

Lesson Plan No. 1: Introduction to the workshop.

Overall Objective: To acquaint the participants with the goals and objectives of the workshops and to assess the existing knowledge and skills of the participants.

Lesson Plan No. 2: Responsibilities and interrelationship of Accountants and Storekeepers.

Overall Objective: To make the Accountants and Storekeepers aware of their interrelationship and to develop and strengthen the sense of mutual cooperation between them.

Lesson Plan No. 3: Assessment of supply requirements.

Overall Objective: The participants will be able to make a correct and complete annual supply needs assessment.

Lesson Plan No. 4: Procurement.

Overall Objective: To improve the knowledge, skills and attitude of storekeepers in procurement procedures.

Lesson Plan No. 5: Distribution.

Overall Objective: To increase the capability of storekeepers to handle the distribution system more effectively.

Lesson Plan No. 6: Record keeping.

Overall Objective: To improve the capability of the storekeepers to prepare and maintain the logistic records correctly and up-to-date.

Lesson Plan No. 7: Warehouse (store) management.

Overall Objective: To make the storekeepers more knowledgeable and skillful in warehouse (store) management.

Lesson Plan No. 8: Physical inventory, Auction, Disposal and Handover.

Overall Objective: To make the storekeepers more capable of working more effectively in the area of physical inventory, auction, disposal and handover.

Lesson Plan No. 9: Reporting.

Overall Objective: To increase the capability of store-keepers to prepare and send necessary reports appropriately, routinely and timely.

Lesson Plan No. 10: Post-test/Workshop Evaluation.

Overall Objective: To assess how much the participants have learned from this workshop by making a comparison of their pre- and post-test scores, and evaluate the whole workshop in terms of achievement against set objectives.

LEARNING OBJECTIVES - SUPPLY MANAGEMENTLesson Plan No. 1

- 1.1 Identify and describe the necessity, importance and purpose of this workshop.
- 1.2 Given a prepared list of questions complete a workshop pre-test in one hour.
- 1.3 Will know each other.

Lesson Plan No. 2

- 2.1 Develop a sense of team spirit and mutual cooperation to accomplish a task collectively.
- 2.2 List the main job functions of accountants.
- 2.3 List the main job functions of storekeepers.
- 2.4 Explain the interpersonal and institutional relationship of Accountants and Storekeepers, and its importance.

Lesson Plan No. 3

- 3.1 List and describe the necessary elements of annual supply needs assessment.
 - 3.2 Fill out the supply needs assessment forms correctly and completely.
- 

Lesson Plan No. 4

- 4.1 Identify the sources where the supplies come from and describe the program budget.
- 4.2 Judge the standard of quality and size of the supplies.
- 4.3 Describe the legal steps to be followed in the process of procurement.
- 4.4 Fill out the purchase order form correctly and completely.

Lesson Plan No. 5

- 5.1 Prepare the supply distribution schedule/format correctly and completely.
- 5.2 Fill out the forms used for out going supplies correctly and completely.

Lesson Plan No. 6

- 6.1 Identify and explain the forms and ledgers used in logistic record keeping and its necessity.
 - 6.2 Identify and explain the main points to be considered while checking the supplies before filling out the receiving report form.
 - 6.3 Fill out the receiving report form correctly and completely.
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- 6.4 Describe the entry record ledger and its process of operation.
- 6.5 Fill out the Entry record ledger correctly and completely.
- 6.6 Identify, explain and fill out the three kinds of stock ledgers.
- 6.7 Fill out the 'bin card' correctly and completely.
- 6.8 Make postings in issue record ledger correctly and completely.
- 6.9 Make postings in personal ledger correctly, completely and with full information.
- 6.10 Keep and maintain each and every stock record complete and updated.

Lesson Plan No. 7

- 7.1 List and describe the purpose and importance of store management.
 - 7.2 List and describe the main points to be considered while selecting the appropriate place for storage in different kinds of warehouse.
 - 7.3 Identify and explain the criteria for classification of items to be stored in an organized way and work accordingly.
- 

- 7.4 Describe the necessity and methods of protection and safety measures.
- 7.5 Explain the utility of routine inspection of stores by storekeepers themselves and act accordingly.
- 7.6 Describe the importance of maintaining cold chain and maintain the cold chain for vaccines.
- 7.7 Store the surgical instruments safely.

Lesson Plan No. 8

- 8.1 Describe the importance and rules of physical inventory.
- 8.2 Fill out the physical inventory forms correctly and completely.
- 8.3 List and describe the reasons and causes of auction, disposal and handover.
- 8.4 Fill out the auction forms, disposal forms and handover forms correctly and completely.

Lesson Plan No. 9

- 9.1 Describe the appropriate time and importance of supply reporting system.
- 9.2 Fill out the reporting forms accurately and timely.

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Lesson Plan No. 10

- 10.1 Given a prepared list of questions complete a workshop post-test in one hour.
- 10.2 Given a prepared questionnaire complete a workshop evaluation in one hour.

APPENDIX D

PRE/POST-TEST PARTICIPANT SCORES

NOTE: Pre/Post-Test was found to be invalid and unreliable due to conditions described elsewhere in this report; actual scores are provided in Appendix B, List of Participants.

APPENDIX E

SUMMARY OF PARTICIPANT REACTION FORMS

INTRAH PARTICIPANT REACTION FORM Nepalgunj

For each set of statements below, please check the one that best describes your feelings about this training.

1. Workshop objectives were:

- | | | | | |
|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| a. Very clear | b. Mostly clear | c. Somewhat clear | d. Not very clear | e. Not clear at all |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2. Workshop objectives seemed to be achieved:

- | | | | | |
|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| a. Entirely | b. Mostly | c. Somewhat | d. Hardly at all | e. Not at all |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

3. With regard to workshop material (presentations, handouts, exercises) seemed to be:

- a. All material was useful
- b. Most materials were useful
- c. Some material was useful
- d. Little material was useful
- e. No material was useful

4. Workshop material presented was clear and easy to follow:

- | | | | | |
|-------------------------------------|----------------------------|--------------------------|----------------------------|--------------------------|
| a. All the time | b. More than half the time | c. About half the time | d. Less than half the time | e. None of the time |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5. The amount of material covered during the workshop was:

- | | | | | |
|-------------|----------------------|---------------------|------------------------|---------------|
| a. Too much | b. Somewhat too much | c. Just about right | d. Somewhat too little | e. Too little |
| <u>20%</u> | <u>20%</u> | <u> </u> | <u> </u> | <u> </u> |

6. The amount of time devoted to the workshop was:

- | | | | | |
|-------------|----------------------|---------------------|------------------------|---------------|
| a. Too much | b. Somewhat too much | c. Just about right | d. Somewhat too little | e. Too little |
| <u>70%</u> | <u>15%</u> | <u>10%</u> | <u> </u> | <u> </u> |

7. For the work I do or am going to do, this workshop was:

- | | | | | |
|----------------|------------------|--------------------|--------------------|----------------------|
| a. Very useful | b. Mostly useful | c. Somewhat useful | d. Not very useful | e. Not useful at all |
| <u> </u> | <u> </u> | <u> </u> | <u> </u> | <u> </u> |

8. Possible solutions to real work problems were dealt with:

- | | | | | |
|-----------------|----------------------------|------------------------|----------------------------|---------------------|
| a. All the time | b. More than half the time | c. About half the time | d. Less than half the time | e. None of the time |
| <u>50%</u> | <u>45%</u> | <u>5%</u> | <u> </u> | <u> </u> |

9. In this workshop I learned:

- 20% a. many important and useful concepts,
30% b. several important and useful concepts,
45% c. some important and useful concepts,
5% d. a few important and useful concepts,
 e. almost no important or useful concepts.

10. In this workshop I had an opportunity to practice:

- 35% a. many important and useful skills,
 b. several important and useful skills,
65% c. some important and useful skills,
 d. a few important and useful skills,
 e. almost no important or useful skills.

11. Workshop facilities and arrangements were:

a. Very good	b. Good	c. Acceptable	d. Barely acceptable	e. Poor
<u>20%</u>	<u>20%</u>	<u>10%</u>	<u>20%</u>	<u> </u>

12. The trainer/trainers for this workshop was/were:

a. Very effective	b. Effective	c. Somewhat effective	d. Not very Effective	e. Not effective at all
<u>45%</u>	<u>30%</u>	<u>10%</u>	<u>5%</u>	<u> </u>

13. The trainer/trainers for this workshop encouraged me to give my opinions of the course:

a. Always	b. Often	c. Sometimes	d. Rarely	e. Never
<u>70%</u>	<u>10%</u>	<u>20%</u>	<u> </u>	<u> </u>

14. In providing information about my progress in training, the trainer/trainers for this workshop were:

a. Very effective	b. Effective	c. Somewhat effective	d. Not very effective	e. Not effective at all
<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>

15. 15% a. I would recommend this workshop without hesitation,

40% b. I would probably recommend this workshop

5% c. I might recommend this workshop to some people

 d. I might not recommend this workshop

 e. I would not recommend this workshop.

16. Please check any of the following that you feel could have improved the workshop.

10.3 a. Additional time for the workshop

 b. More limited time for the workshop

10.7 c. Use of more realistic examples and applications

14.1 d. More time to practice skills and techniques

1.7 e. More time to become familiar with theory and concepts

12.8 f. More effective trainers

15.4 g. More effective group interaction

 h. Different training site or location

5.1 i. More preparation time outside the training sessions

10.7 j. More time spent in actual training activities

1.5 k. Concentration on a more limited and specific topic

3.0 l. Consideration of a broader and more comprehensive topic

2.5 m. Other (specify) _____

- Evaluating day to day according to participants for effectiveness

- Consideration of individualized training for some

Total 72

17. Below are several topics that were presented in the workshop. Please indicate the usefulness of the topics to you in the scale at right.

	very useful			hardly useful	
	1	2	3	4	5
a. <u>Introduction</u>	68.4	26.9	5.2		
b. <u>Relationships of Goals & Strategies</u>	12.9	14.2	5.2		
c. <u>Accts. & Book-keeping Systems</u>	71.2	17.5	5.2		
d. <u>Budget Formulation & Release</u>	22.1	14.5			
e. <u>Budget Execution</u>	77.1	11.1			
f. <u>Book-keeping</u>	77.1	14.1	5.2		
g. <u>Programs & Activity Accts</u>	15.0	25	5	15	5
h. <u>Logistics Records</u>	8.9	10.5	10.5		
i. <u>Fin Reporting & Auditing</u>	43.3	17.7			
j. _____					

18. For the following techniques or resources, please check the box on the right that best describes your view of their usefulness for your learning in this workshop.

Techniques/ Resources	very useful			hardly useful		does not apply 6
	1	2	3	4	5	
a. lectures						
b. group discussions	1.5	5.1				
c. individual exercises	22.4	1.1	1.9			
d. group exercises	26.9	22.1				
e. <u>clinical sessions</u>						
f. field trips	7.1	21.1	9.1			14.6
g. handouts/readings	17.1	21.1				
h. books		2.7		2.7		
i. audio-visuals	1.5	1.1				2.3

19. From the list below, please indicate the three (3) areas in which you feel additional training in a future course would be most useful to you.

26.5 a. Counselling and/or client education

3.5 b. Provision of Clinical Methods (IUDs, pills, diaphragms, injections)

3.5 c. Provision of Non-clinical Methods (condoms, foaming tablets, foam)

5.3 d. Provision of Natural Family Planning Methods (rhythm, sympto-thermal, mucous)

10.5 e. Supervision of Family Planning Services

17.5 f. Management of Family Planning Service System

17.5 g. Planning/Evaluation of Family Planning Services

17.7 h. Policy Making/Direction of Family Planning Services

17.7 i. Community Based Distribution of Contraceptives

17.7 j. Community Based Outreach, Education or Information

17.0 k. In-Service Training in Family Planning

_____ l. Pre-Service Teaching/Tutoring in Family Planning

_____ m. Other (specify) _____

20. Additional Comments: _____

Feel free to sign your name. (Optional)

May, 1985

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Course ID#

Storekeeper Training
Albuquerque

INTRAH PARTICIPANT REACTION FORM

For each set of statements below, please check the one that best describes your feelings about this training.

1. Workshop objectives were:

- | | | | | |
|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| a. Very clear | b. Mostly clear | c. Somewhat clear | d. Not very clear | e. Not clear at all |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2. Workshop objectives seemed to be achieved:

- | | | | | |
|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| a. Entirely | b. Mostly | c. Somewhat | d. Hardly at all | e. Not at all |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

3. With regard to workshop material (presentations, handouts, exercises) seemed to be:

- a. All material was useful
- b. Most materials were useful
- c. Some material was useful
- d. Little material was useful
- e. No material was useful

4. Workshop material presented was clear and easy to follow:

- | | | | | |
|-------------------------------------|----------------------------|--------------------------|----------------------------|--------------------------|
| a. All the time | b. More than half the time | c. About half the time | d. Less than half the time | e. None of the time |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5. The amount of material covered during the workshop was:

- a. Too much b. Somewhat too much c. Just about right d. Somewhat too little e. Too little
- 100%

6. The amount of time devoted to the workshop was:

- a. Too much b. Somewhat too much c. Just about right d. Somewhat too little e. Too little
- 66.7% 16.7% 16.7% 5.5%

7. For the work I do or am going to do, this workshop was:

- a. Very useful b. Mostly useful c. Somewhat useful d. Not very useful e. Not useful at all
- 94.4% 5.6%

8. Possible solutions to real work problems were dealt with:

- a. All the time b. More than half the time c. About half the time d. Less than half the time e. None of the time
- 100% 22.2%

9. In this workshop I learned:

- a. many important and useful concepts,
 b. several important and useful concepts,
 c. some important and useful concepts,
 d. a few important and useful concepts,
 e. almost no important or useful concepts.

10. In this workshop I had an opportunity to practice:

- 100% a. many important and useful skills,
 22.2% b. several important and useful skills,
 c. some important and useful skills,
 d. a few important and useful skills,
 e. almost no important or useful skills.

11. Workshop facilities and arrangements were:

a. Very good b. Good c. Acceptable d. Barely acceptable e. Poor

22.2 28.9 1.0

12. The trainer/trainers for this workshop was/were:

a. Very effective b. Effective c. Somewhat effective d. Not very Effective e. Not effective at all

6.1 38.9

13. The trainer/trainers for this workshop encouraged me to give my opinions of the course:

a. Always b. Often c. Sometimes d. Rarely e. Never

6.4 25.0

14. In providing information about my progress in training, the trainer/trainers for this workshop were:

a. Very effective b. Effective c. Somewhat effective d. Not very effective e. Not effective at all

2.7 41.2

15. 11.11 a. I would recommend this workshop without hesitation,

4.6 b. I would probably recommend this workshop

 c. I might recommend this workshop to some people

 d. I might not recommend this workshop

 e. I would not recommend this workshop.

16. Please check any of the following that you feel could have improved the workshop.

16.4 a. Additional time for the workshop

0 b. More limited time for the workshop

12.3 c. Use of more realistic examples and applications

16.4 d. More time to practice skills and techniques

6.8 e. More time to become familiar with theory and concepts

6.8 f. More effective trainers

9.6 g. More effective group interaction

4.1 h. Different training site or location

9.6 i. More preparation time outside the training sessions

8.2 j. More time spent in actual training activities

1.4 k. Concentration on a more limited and specific topic

1.4 l. Consideration of a broader and more comprehensive topic

6.8 m. Other (specify) _____

12/10/18

17. Below are several topics that were presented in the workshop. Please indicate the usefulness of the topics to you in the scale at right.

	very useful			hardly useful	
	1	2	3	4	5
a. <u>Workshop Inadequacy</u>	1	8	2		
b. <u>Relationships of Accts & Stakeholders</u>	1	3	6	7	
c. <u>Supply Requirements</u>		2	10	2	
d. <u>Procurement</u>	1	2	1	3	6
e. <u>Visit, Britain</u>	1	2	1	3	6
f. <u>Record Keeping</u>	1	1			2
g. <u>Stores, Mgt.</u>	1	2	2	2	6
h. <u>Inventory, Acquisition & Disposal</u>		2			
i. <u>Reporting</u>	1	1			
j. _____					

18. For the following techniques or resources, please check the box on the right that best describes your view of their usefulness for your learning in this workshop.

Techniques/ Resources	very useful			hardly useful		does not apply 6
	1	2	3	4	5	
a. lectures		1	1			
b. group discussions		1	1			
c. individual exercises		1	1			
d. group exercises		1	1			
e. <u>clinical sessions</u>						
f. field trips	1	1	2			2
g. handouts/readings	1	1	2			
h. books	1	2	1			
i. audio-visuals						

19. From the list below, please indicate the three (3) areas in which you feel additional training in a future course would be most useful to you.

- 7.8 a. Counselling and/or client education
- 7.8 b. Provision of Clinical Methods (IUDs, pills, diaphragms, injections)
- 17.6 c. Provision of Non-clinical Methods (condoms, foaming tablets, foam)
- 0 d. Provision of Natural Family Planning Methods (rhythm, sympto-thermal, mucous)
- 3.9 e. Supervision of Family Planning Services
- 21.6 f. Management of Family Planning Service System
- 21.6 g. Planning/Evaluation of Family Planning Services
- 7.9 h. Policy Making/Direction of Family Planning Services
- 2.0 i. Community Based Distribution of Contraceptives
- 7.8 j. Community Based Outreach, Education or Information
- 5.9 k. In-Service Training in Family Planning
- 0 l. Pre-Service Teaching/Tutoring in Family Planning
- 0 m. Other (specify) _____

20. Additional Comments: _____

Feel free to sign your name. (Optional)

APPENDIX F

AGENDA OF DEBRIEFING WORKSHOP FOR ACCOUNTANT AND STOREKEEPER TRAINERS

MARCH 19 - 21, 1986, Kathmandu, Nepal

WEDNESDAY, MARCH 19

- 10:00 AM Brainstorming Session - Lessons Learned
- 11:30 AM Review Session with Dr. Khatri and Dr. Bhattari
- 1:00 PM Lesson Plan Revisions

THURSDAY, MARCH 20

- 10:00 AM Lesson Plan Revisions Continued
- 11:00 AM Brainstorming Session - Evaluation
- 12:00 AM Pre/Post Test Revisions
- 2:30 PM Brainstorming - Workshop Logistics
- 4:00 PM Pre/Post Test Revisions Continued

FRIDAY, MARCH 21

- 10:00 AM Manual Revisions, Handout Revisions, Model Answers for Exercises
- 5:00 PM Wrap-up and turn over of materials to DORC for typing

b2

APPENDIX G

SUMMARY OF LESSONS LEARNED

- A. REGARDING THE TRAINEES:
- Some were bright and some very dull.
 - Some worked hard and some were lazy.
 - Some were very experienced and some were very inexperienced.
 - Some would copy others work if given the slightest opportunity.
 - Most were more concerned about their food and per diem than about the training.
 - Some accountants neglected to bring their pocket calculators.
 - Initially most did not do their homework assignments.
 - Some arrived at workshop a day or two late.
 - Three storekeepers were sick most of the first week.
 - Some continued to try and obtain help from other trainees on their individual exercises.
 - Several accountants and storekeepers lacked basic math skills.
 - Most arrived with poor attitudes about learning, some retained this attitude throughout workshop.
- B. REGARDING THE CURRICULUM DESIGN AND LESSON PLANS:
- Some topics need resequencing to improve learning efficiency.
 - Some new topics need to be added.
 - Time schedules can now be revised based on actual experience with trainees and training methods.
 - Lead trainer and other trainer assignments need to be made ahead of time.
 - Need more specific description of training methods for some lessons.
 - Need more complete description of training materials for some lessons.
 - Need to begin and end methods column of lesson plans with review of learning objective.
 - Need to use lesson plans more consistently as "road maps" during workshop.
 - Need more skills exercises and less time on knowledge transfer presentations.
 - Need to proof for typing errors before reproduction.
- C. REGARDING CURRICULUM CONTENT MANUALS:
- Need to be fully completed for handing out at beginning of workshop after pre-test.

- Need more practical content on some topics.
- Need for some topics to be further elaborated and explained, with better illustrations and examples.
- Pages were not correctly numbered.
- Need typing errors corrected before reproduction.

D. REGARDING OTHER TRAINING MATERIALS AND AIDS:

- Need to be all prepared ahead of time.
- Handouts need to be proofed for typing errors before reproduction.
- Skills exercises need to be better planned and organized, step by step.
- Some exercises still need to be translated from English to Nepali.
- The first week's visual aids that were put on newsprint need to be put on cardboard for more permanent future use.
- Some visual aids were difficult to read from a distance.
- Some visual aids were not well designed.
- Need to prepare "model answers" for all exercises.

E. REGARDING TRAINING METHODS:

- Initially trainers lectured too much before learning how to facilitate group discussion.
- Initially did not begin each training day with review and feedback session.
- Initially did not introduce each new lesson or session with review of learning objective.
- Initially trainers would speak to walls and the easel board instead of trainees when presenting visual aids.
- Initially trainers did not explain exercises clearly and ask for questions to clarify.
- Initially trainers did not monitor individual trainees to identify and assist those having difficulty.
- Initially did not conduct brainstorming sessions with enough efficiency.
- Sometimes forgot to follow lesson plan sequence of methods, or forgot and skipped a step in the method.
- Sometimes did not question trainees enough, and encourage their feedback.
- Sometimes made last minute changes in lesson plans without advising trainees ahead of time.

-Initially did not begin and end sessions on time.

F. REGARDING CLASSROOM FACILITIES AND EQUIPMENT:

-Initially organized trainee seating for old fashioned lecture method.

-Did not plan for enough table space needed to do spreadsheet exercises.

-Did not have adequate table workspace for trainers.

G. REGARDING THE PRE/POST-TEST:

-Did not cover some important topics.

-Need more skills tests on key skills.

-Some questions were confusing.

-Forgot forms needed for exercise.

-Need copy of model answers for each trainer.

-Typing errors not corrected before reproduction.

-Trainee seating arrangements initially allowed copying.

-Instructions to trainees were not complete and clearly understood, about the purpose of the pre-test, and about how to answer multiple choice questions.

-Doors were not monitored so a student slipped out to get answers.

-Pre-tests were not graded early to identify weak trainees needing special help.

-Grading of post-test took too long because work was not equally divided among training team members.

-Late comers were not given pre-test soon enough.

H. REGARDING WORKSHOP LOGISTICS:

-Trainee voucher forms for payments need translation into Nepali.

-Rules for computing trainee per diem and walking fees need clarification and should be better explained to trainees.

-Workshop supplies were not adequately identified and purchased before workshop.

-Supply lists were not complete; e.g., masking tape not included.

-Adequate amounts of newsprint and cardboard stock for visual aids were initially provided.

- Last minute procurement of accounting forms from marketplace resulted in some forms being unavailable.
- Appropriate trainee and trainer name tags were unavailable.
- Some supplies were stored away from classroom and sometimes not available when needed.
- Daily snacks and drinks were seldom served on time, disrupting the training schedule.
- Daily snacks were of poor quality resulting in many continuing complaints by trainees and trainers.
- Trainees did not complete and turn in their voucher reimbursement forms until the last day. Many errors in computation resulted in delays in issuing them their payments.
- Needs to be more communication and collaboration between trainers, trainees and the logistical support person, on a day by day basis.

APPENDIX H

DRAFT MEMORANDUM ON FOLLOW-ON FINANCIAL MANAGEMENT ASSISTANCE NEEDS

TO : USAID/Kathmandu

FROM: Secretary, Ministry of Health

SUBJECT: Request for assistance to continue up-grading
the FP/MCH Project Financial Management System

As you know, at the request of USAID and others, the Ministry of Health is proceeding with the design and implementation of improved financial management systems. The FP/MCH Project has over the past year with assistance from the AID centrally funded INTRAH Project, redesigned its fiscal accounting and reporting system to accommodate the need for accountability and reporting at the programme and activity levels of the Project. Their financial management procedures manual has been revised to reflect the new programme-wise and activity-wise accounting and reporting system. A training curriculum for FP/MCH Project accountants was designed, recently tested and refined, and a training programme to implement the new system and to upgrade knowledge and skills of accountants at district, regional, and central levels has begun. It is anticipated that by September of this year all key FP/MCH Project accountants will have been trained in the new programme-wise and activity-wise, fiscal accounting and reporting system. Similarly, improvement in supply management accountability and reporting are also being designed and implemented by the FP/MCH Project. Also training of district, regional and central storekeepers in the improved procedures has begun with the assistance of INTRAH.

Now that the FP/MCH Project is well underway in implementing programme-wise and activity-wise accounting and reporting, some additional needs have emerged that would provide for further and significant improvements in the financial management of the FP/MCH Project. They are:

1. The need to computerize the central office production of financial reports on a programme-wise and activity-wise basis, to improve the timeliness and accuracy of monthly reports. This would also include financial records and reports on the value of existing stock inventories. Recently acquired micro-computers and related software are available, however there is need for assistance in systems analysis and design, and in training central office staff.
2. The need to supplement the existing HMG and FP/MCH Project cash accounting and reporting system with a provision for monitoring accumulated liabilities and anticipated revenues in order that cash flow can be better managed. This would require technical assistance in systems analysis and design, and assistance in training accounting staff.

-2-

3. The need to supplement the existing financial management reporting system with financial reports of greater use to project managers at central, regional and district levels, of the FP/MCH service delivery system. Existing financial reports were designed primarily by accountants for accountants. While useful to project managers having responsibility for financial management, they do not satisfy the need for more sophisticated financial management data such as unit cost data including measures of efficiency and productivity that can be provided by combining existing financial (input) data with existing service delivery (output) data, e.g. cost per FP acceptor by district. Such data would greatly enhance project planning, budgeting, budget justifying, resource allocation, project management and evaluation. Since both financial and service delivery data are now or will shortly be available, assistance is needed to design procedures and formats for computer production of these reports, for training technicians in report production, and for orienting/training project managers at central, regional and district levels on the interpretation and use of these reports.

The Ministry of Health is strongly supportive of the initiatives being taken by the FP/MCH Project to upgrade their overall financial management. The Ministry views these initiatives as an opportunity to pilot-test improvements that could be replicated throughout the Ministry if proven useful.

Existing efforts to improve the financial management with the Ministry are being coordinated with central government agencies responsible for various aspects of financial management including the Accountant Generals Office of Ministry of Finance and the Auditor General's Office. If assistance can be provided by USAID to satisfy the three emerging needs described above, it is the intention of the FP/MCH Project to work in close collaboration with the central government agencies as these agencies have also expressed a keen interest in being involved in designing and pilot-testing the proposed improvements.

Your kind consideration of this request for assistance will be most appreciated.