

PD-ABH-568

86191

**TRIP REPORT: BANGLADESH
TECHNICAL ASSISTANCE IN MIS,
CA/NGO PROJECT**

NOVEMBER 21 - DECEMBER 9, 1993

Hillard Davis
Margaret Watt

FAMILY PLANNING MANAGEMENT DEVELOPMENT

Project No.: 936-3055
Contract No.: DPE-3055-Q-00-0052-00
Task Order No.: A1717 BANGO

CONTENTS

LIST OF ACRONYMS	2
I. EXECUTIVE SUMMARY	3
II. BACKGROUND	3
III. PURPOSE AND SCOPE OF WORK	4
IV. ACTIVITIES	5
V. OBSERVATIONS	6
VI. RECOMMENDATIONS	8
VII. NEXT STEPS	9
ANNEX I: SCOPE OF WORK AND WORKPLAN FOR SUBSEQUENT VISITS ..	11
ANNEX II: REVISED SEMIANNUAL REPORT	13
ANNEX III: CA MIS NEEDS	21
ANNEX IV: LIST OF CONTACTS	23

LIST OF ACRONYMS

AVSC	Association for Voluntary Surgical Contraception
CA	Collaborating Agency
CBD	Community Based Distribution
CPR	Contraceptive Prevalence Rate
ELCO	Eligible Couple
FPAB	Family Planning Association of Bangladesh
FPMD	Family Planning Management Development Project
FPSTC	Family Planning Services and Training Centre
MDA	Management Development Assessment
MIS	Management Information Systems
MSH	Management Sciences for Health
NGO	Non Governmental Organization
NGOCC	NGO Coordinating Committee
PI	Pathfinder International
QES	Quality, Expansion, Sustainability
SOW	Scope of Work
TA	Technical Assistance
TAF	The Asia Foundation
USAID	United States Agency for International Development

I. EXECUTIVE SUMMARY

The Family Planning Management Development (FPMD) Project of Management Sciences for Health (MSH) carried out a project design assignment for the USAID-funded Collaborating Agencies (CAs) in Bangladesh in April 1993, as a result of which the CA management information systems (MIS) were targeted for technical assistance. The general objective of the MIS technical assistance was to develop a comparable analytic framework for measuring achievement of the combined CA programs toward their strategy of Quality, Expansion, and Sustainability (QES).

The FPMD/MIS team carried out its first visit to Bangladesh from November 21st - December 9th, 1993, with the goal of reviewing the operationalization of the QES strategy within the CA information systems, in particular looking at CA reporting to USAID on the QES indicators in the first semi-annual report. The team found that there had been considerable difficulty in operationalizing, reporting on, and using the QES indicators. As a result of the team's discussions with the CAs, USAID, and the Pathfinder technical assistance (TA) team which was also present and with whom FPMD/MIS collaborated, the umbrella scope of work was modified.

The revised SOW reflects the need to revisit the indicators used for measuring CA/NGO achievements under the QES strategy, before proceeding with the work originally envisioned: technical assistance aimed at integrating the outputs of the CA information systems into a general program MIS; training of CA staff capabilities to improve use of the QES-based MIS; and development of a computer-based mechanism for comparing the outputs of the various CA information systems. Under this SOW, the next steps are to define and pilot test QES indicators, which will be presented to the CAs for discussion in May. Once finalized and adopted, these indicators will be operationalized through technical assistance and training. Training will emphasize the use of the information for planning and evaluation of the CA/NGO work. A computerized tool to provide "executive information" will subsequently be developed to facilitate compilation and comparison of CA information. In the meantime, a streamlined version of the semi-annual report was developed to assist in the analysis and use of the information to be presented in the January semi-annual report.

II. BACKGROUND

In April of 1993, an FPMD project design team worked with the five family planning Collaborating Agencies (CAs) -- the Family Planning Association of Bangladesh (FPAB), Family Planning Services and Training Centre (FPSTC), The Asia Foundation (TAF), the Association for Voluntary Surgical Contraception (AVSC), and Pathfinder Fund International (PFI) -- responsible for overseeing and supporting the local family planning NGOs. FPMD identified three specific areas in which technical assistance would help the CAs/NGOs meet their strategic goals of improving the Quality of services, the Expansion of coverage, and the strengthening of their institutional, managerial, and financial Sustainability, a strategy known as QES. (See A. Ellis, S. Helfenbein, S. Sacca report: Visit to Bangladesh to Develop a

Plan for Technical Assistance to the CA/NGO Project, April 11-28, 1993.)

One of the areas targeted for provision of technical assistance was the management information system (MIS). Developing a system for measuring QES achievements across CA programs would facilitate long-term planning, resource allocation, and evaluation of the overall family planning program. The general objective identified for the MIS technical assistance was therefore to develop a comparable analytic framework for measuring achievement of the combined CA programs on the basis of a set of key QES indicators.

The technical role of the MIS technical assistance team was to have three main components:

- development of a methodology for integrating the outputs of CA information systems into a general program MIS;
- strengthening of CA staff capabilities in using the QES-based MIS in planning, budgeting, monitoring, and evaluation, as appropriate;
- development of a computer-based mechanism for compiling and comparing the outputs of the various CA information systems in order to provide a general report for use by USAID and the CAs.

A Scope of Work was developed to outline the technical activities, level of effort required, expected outputs, and timelines for achieving these results.

Following the FPMD needs assessment, USAID/Dhaka in collaboration with the CAs initiated the development of indicators for measuring QES and designed a format for semi-annual reporting on these indicators and on the CAs' Cooperative Agreements. The first semi-annual report was submitted by the CAs to USAID in July of 1993. Based on this experience, the CAs reported that the report development was an arduous process from data collection and processing to reporting. Furthermore, the output did not fully meet the expectations of the CAs and USAID.

III. PURPOSE AND SCOPE OF WORK

The FPMD/MIS team, consisting of Hillard Davis, MIS Program Associate/Statistics and Margaret Watt, MIS Program Associate -- both of MSH's MIS Program -- carried out its first visit to Bangladesh from November 21st - December 9th, 1993. The objectives of the visit were to orient the team to the local setting, review implementation to date of the QES strategy within the CA information systems (specifically focusing on the semi-annual report), and specify the scope of work for ongoing FPMD/MIS assistance.

The specific Scope of Work for this assignment was to:

1. Meet with the CA Executives to review the SOW and obtain input.
2. Meet with the NGO Coordinating Committee (NGOCC) MIS subcommittee to review the CA information systems and experiences in operationalizing QES indicators.
3. Meet with USAID to obtain feedback on the CAs' experience with the QES indicators to date, notably in preparing the first semiannual report.
4. Discuss the development of a computer-based mechanism for combining the semi-annual reports from the CAs into one report for use by USAID, and explore necessary software needs.
5. Organize a working meeting with MIS staff to initiate the development of the technical components of the NGO program MIS.
6. Identify the specific TA needs of TAF and FPAB for operationalizing the QES indicators within their MIS. Determine whether other CAs require such assistance.
7. Develop a specific SOW, with dates, for the next consultancy and review it with USAID and the CA Executives.
8. Coordinate with Pathfinder's Asia/Near East Technical Director and Evaluation Director in implementing this TDY and in formulating next steps.

Because of the feedback on the difficulty in operationalizing, reporting on, and using the QES indicators, the team conducted a thorough needs assessment. As a result of the team's discussions with the CAs, USAID, and the Pathfinder TA team, the umbrella scope of work was modified to reflect the need to revisit the indicators used for measuring CA/NGO achievements under the QES strategy. It will be important to define carefully the indicators to be used, before proceeding with the SOW originally envisioned (integration of the outputs of the CA information systems into a general program MIS; strengthening of CA staff capabilities in using the QES-based MIS; and development of a computer-based mechanism for comparing the outputs of the various CA information systems). The modified SOW is reflected in this report under VI., Recommendations; VII., Next Steps; and Annex I, Scope of Work and Workplan for Subsequent Visits.

IV. ACTIVITIES

A briefing meeting with the CA Executives was held at Pathfinder to receive preliminary input and discuss the plans for the consultancy. Individual discussions with the Executives of AVSC, TAF, FPAB, and Pathfinder were held during subsequent visits to those agencies.

During the three-week visit, the MIS technical assistance team carried out the following activities:

- held a briefing meeting with the CA Executives to receive preliminary input and to discuss the plans for the consultancy;
- met three times with USAID/Dhaka staff to review expectations and needs;

- held three working sessions with the MIS staff from the five CAs:
 - an initial session at which each CA representative made a presentation on his agency's MIS;
 - a working meeting to discuss the content and format issues with the semi-annual report; and
 - a working meeting allowing the MIS staff to present and discuss each agency's suggestions for streamlining the semi-annual reporting format in preparation for the January report, the outputs of which were presented to USAID/Dhaka for modification and approval (see Annex II, Revised Semi-annual Report);
- conducted site visits of one-half to a full day's duration to each of the five CAs to meet individually with each agency's Executive and MIS staff and to review the agency's MIS and discuss the collection, processing, and reporting of the QES indicators for the first semi-annual report (see Annex III, CA Technical Assistance Needs);
- made a one-day field visit to both a Swarnivar project in Kalihati (Tangail district), to observe the monthly meeting of the project's CBD staff and to discuss the data collection and analysis at that level, and an FPAB clinic situated in the city of Tangail, to meet with staff and discuss data collection, reporting, and feedback;
- participated in four working sessions with the Pathfinder team of consultants (Bob Timmons and Jaime Benavente) to identify areas of collaboration, analyze the quality indicators selected for pilot-testing, and identify preliminary indicators for expansion;
- held individual debriefing sessions at TAF, AVSC, and FPAB to discuss the findings during the visit and to discuss the future scope of work, in lieu of a general debriefing for the CA Executives, which was not able to be arranged given their high level of participation in the Population Fortnight taking place at that time;
- held a joint debriefing with the Pathfinder team at USAID.

V. OBSERVATIONS

The above activities led the team to a number of observations, which are categorized as they relate to the QES indicators, the semi-annual report, and the CA management information systems.

A. The QES Indicators

1. The indicators currently included in the semi-annual report do not provide a good picture of the overall Quality, Expansion, and Sustainability achievements of the family planning CAs and NGOs.
2. The information currently reported in the semi-annual report is not all required semi-annually.
3. Data collection and processing of the information for the first annual semi-annual report posed an enormous burden both at the field level and at CA headquarters.

B. The Semi-annual Report

1. All players (CAs and USAID/Dhaka) agree that the semi-annual report is not as useful as it could be in its current form, not only in terms of its structure, but also in terms of the information provided.
2. The presentation and aggregation of the information is not always meaningful since some definitions are not used in a standardized manner across CAs (e.g., dissemination and testing of innovative techniques; reporting on long-term targets [1-, 2-, or 5-years]), and evaluation of program performance is difficult because comparisons to long-term targets are affected by changing baselines (e.g., graduating NGOs, new projects in low-prevalence areas).
3. Definitions and procedures for the semi-annual report were not adequately developed.

C. The CA Management Information Systems

1. The MIS in place in the five CAs varied in terms of effectiveness, efficiency, staffing, and degree of computerization, although the lesser-developed systems are already undergoing a process of analysis and computerization. All the CAs will eventually be using compatible database formats.
2. The CAs' MIS serve primarily to monitor service delivery activities and outputs, and are not fully adequate or used for planning and evaluation purposes, nor to link with other subsystems (such as finance).
3. The CAs have varied reporting requirements (to the Government, donors, parent organizations) but often do not receive useful feedback from their reports.
4. The CAs provide feedback to their reporting units primarily through corrections to reporting forms and monitoring visits, rather than regular reports analyzing NGO contribution to overall performance or comparisons to other reporting units.

5. An estimated 40% of the information needed for the semi-annual report has not been operationalized within the CAs' information systems.
6. The MIS and program staffs of the CAs and NGOs would benefit from training in ways to use the QES indicators and other output for evaluation and program planning as well as administrative reporting.

VI. RECOMMENDATIONS

The recommendations given here are based on the observations noted above.

A. The QES Indicators

1. The QES indicators need to be revisited so as to ensure that they are expressed meaningfully and that they measure the appropriate elements and subelements of the QES strategy. The work done previously by USAID and the CAs provides a good starting point, as key elements to be measured were identified and important variables were selected for the semi-annual report.
2. A pilot test of select QES indicators should be conducted so that their effectiveness as a measurement tool can be evaluated scientifically. The test can be conducted via Pathfinder's Operations Research Functional Specialty.
3. A workshop should be held to present the results of the pilot test to the CA Executives, program, and MIS staff and to USAID for discussion, appropriate modification, and finalization of the key indicators.

B. The Semi-annual Report

1. The semi-annual report should be streamlined to provide a working document that can be produced regularly and used by all interested parties to efficiently and effectively manage their participation in the Bangladesh family planning program. (For the suggested modifications and rationale presented to USAID, see Annex II, Revised Semi-annual Report.)

A set of clear, concise definitions and procedures are needed to ensure comparability among reports from various CAs.

C. The MIS

1. Technical assistance in operationalizing the QES indicators should be provided after refinement and testing of the indicators being brought on-line.
2. Training should be provided to CA Executives, CA program and MIS staff, and NGO

staff in ways to use the QES indicators and other outputs for evaluation and program planning.

3. Once the indicators have been finalized and operationalized, a computerized "executive information system" can be developed to compile the outputs of the five MIS for reporting and comparison purposes.

VII. NEXT STEPS

A. Semi-annual Report

Recommendations for streamlining the semi-annual report were developed by FPMD/MIS and the CA MIS personnel and forwarded to USAID, in hopes of facilitating the analysis and use of the information as well as reducing the reporting burden. USAID should provide feedback to the CAs on their acceptance of/modifications to the streamlined version of the report prior to the January reporting period.

B. Indicators

The Quality indicators to be pretested were defined during the course of this TDY, and a workplan for a pilot test of these indicators was developed. In addition, preliminary discussion between the Pathfinder and FPMD/MIS TA teams on the Expansion indicators took place. The next steps will be important to follow up on this work:

- FPMD/MIS and Pathfinder will collaborate in Boston to finalize the Expansion indicators, which will be pilot tested along with the Quality indicators in selected service delivery sites. The pilot test will be implemented by Pathfinder under its Operations Research Functional Specialty.
- FPMD/MIS, the FPMD MDA team, and Pathfinder will collaborate in Boston on the identification of Sustainability indicators and will draw up a preliminary plan for a pilot test of these indicators based on communication with CA staff in Dhaka (particularly TAF, which has offered to serve as the test site). This pilot test will be separate from the Quality and Expansion indicators test. since the focus is on institutions rather than on service delivery.
- FPMD/MIS and Pathfinder will travel to Bangladesh to finalize preparations for and launch the pilot tests in the beginning of February.
- FPMD/MIS and Pathfinder will return to Bangladesh in May to analyze the pilot test results and hold a workshop for CA staff to present the results and finalize the indicators.

FPMD/MIS and Pathfinder will make every attempt to stay informed of progress on the pilot tests and to maintain contact at every stage.

C. TA and Training

Subsequently, technical assistance will be provided in operationalizing these indicators within the CA information systems. A minimum level of technical assistance will be provided to all the CAs in the identification of the data needs for the indicators and in the collection of non-routine information for the QES indicators (for example, questionnaire development). More in-depth technical assistance will be provided as needed to FPAB and TAF.

Training will also be provided for CA and NGO staff at various levels. It will focus on key aspects of the collection and processing of the information as well as on the use of the QES information in planning and evaluation.

ANNEX I: SCOPE OF WORK AND WORKPLAN FOR SUBSEQUENT VISITS

December - January

Boston: FPMD/MIS and Pathfinder collaboration to finalize list of Expansion indicators to be pilot tested.

FPMD/MIS, FPMD/MDA, and Pathfinder collaboration to finalize Sustainability indicators to be pilot tested and to design pilot test. Note: The Asia Foundation has expressed an interest in serving as a test site for the Sustainability indicators.

Dhaka: Pathfinder/OR staff to prepare for pilot test of Quality and Expansion indicators at selected service delivery site(s), according to workplan already developed by Pathfinder consultants.

USAID/Dhaka to provide feedback to CAs on the streamlined semi-annual report format and whether it may be used (and if so, with what modifications) for the January reporting period.

February

Dhaka: FPMD/MIS and Pathfinder staff to conduct two-week visit to Bangladesh specifically to:

- Launch the Quality and Expansion indicators pilot test;
- Finalize with CA staff the Sustainability indicators to be pilot tested;
- Make arrangements for and launch the Sustainability pilot test.

Boston: Once the pilot tests are underway, the TA team will maintain contact and receive regular reports on the progress throughout the test period (February - April).

May

Dhaka: FPMD/MIS and Pathfinder staff to conduct two-week visit to Bangladesh in order to:

- Analyze the pilot test results;
- Conduct a workshop with CA/NGO and USAID staff to present the test findings and finalize the indicators;
- Assess the needs of the five CAs with regard to availability of the selected indicators (routine data collection, special studies/exit interviews, processing);

- Based on identified needs, determine what technical assistance will be provided in the follow-up visits and identify the tasks that the CAs can carry out in order to lay the necessary groundwork.

CAs to begin planning for operationalization of QES indicators. CAs should identify the availability of the necessary information, the source of data items, data flow needs, etc. Where possible, the CAs should begin operationalizing the routine information (May - July).

July

Dhaka: FPMD/MIS to carry out three-week assignment to:

- Assist CAs in defining processes and tools for the collection of non-routine information for the QES indicators (for example, questionnaires and protocols for exit interviews);
- Review CA efforts to operationalize routine QES information;
- Discuss training implications for CA/NGO personnel involved in data collection and processing;
- Assist specific CAs in operationalizing routine QES information as necessary (FPAB, TAF, AVSC).

Boston: FPMD/MIS to develop specifications for a computerized tool for compiling QES indicators across CAs (following TDY).

September

Dhaka: FPMD/MIS to carry out three-week assignment to:

- Examine CA efforts to operationalize QES information and identify needs for follow-up assistance;
- Hold training workshop for CA staff designed to strengthen their skills in analyzing and using the QES indicators for planning and evaluation;
- Develop and/or oversee development of a computerized "executive information system" to extract the QES indicators from the various CA information systems and import them into a standard file structure for comparison and compilation.

November-December

Dhaka: FPMD/MIS to carry out two-week assignment to provide additional training, follow-up technical assistance, and evaluation of the CAs' processing, analysis, and use of the QES indicators.

ANNEX II: REVISED SEMIANNUAL REPORT

REVISED SEMI-ANNUAL REPORT FORMAT

Following are the tables suggested by the CAs for preparing the upcoming report, along with a rationale for the proposed changes. In addition, it is recommended that the CAs be allowed 45 days after the end of the reporting period for preparation of the report.

- The proposed tables include: Table I, Key Achievement Indicators; Table II, Activities Summary; Table III, Expenditures in Relation to Budget; Table IV, Personnel; Table V, NGO Active Users by Method, Source (Project/Other), and Cost. These tables, which provide compatible information relevant to all CAs, for the most part are similar to the original tables.
- The major differences lie in (a) reporting only on annual target achievement, and (b) reporting on innovative techniques, audits, evaluations, and waivers in a narrative form. These are discussed below.
- Once any modifications suggested by USAID have been made and disseminated, the format will be adopted for the next reporting period.
- Please note that the indicators for Quality, Expansion, and Sustainability will be finalized during the next technical assistance visits.

TABLE I

Table I is based upon the former Table II-1 (CA/NGO Program Key Achievement Indicators). It is designed to provide only a summary of the critical indicators such as CAR. For this reason, the following modifications are proposed:

- Only % clinical AUs is included here; the actual # is in the proposed Table V (NGO Active Users)
- Total # AUs is excluded here since # ELCOs and CAR provide the relevant information; the # is available in Table V
- # AUs by Project and Other source are represented here with % AUs by PS (details are provided in Table V)
- Details on total # low-parity and newlywed ELCOs and # using FP are in Table II.
- NGO scoring on the Sustainability Scale (formerly Table II-1b) is represented by the average score.
- The five-year targets are not provided since comparisons to these targets are often not meaningful given changing baselines (graduating NGOs, new project sites, etc.). The CAs would prefer to receive this information as feedback from USAID.
- The details of Table II-1c are now included in the second table; only "total funds generated by NGOs" is included as a Key Achievement Indicator.

TABLE I - KEY ACHIEVEMENT INDICATORS

INDICATOR	LAST PER.	THIS PER.	% CHANGE	YEAR TARGET	% TARGET ACHIEVED
I. QUALITY					
CAR					
% Clinical Method Users					
% Confirmed Referrals					
II. EXPANSION					
# ELCOs Served					
% Active Users - Project Source					
% Low-Parity Couples Using FP					
% Newlyweds Using FP					
III. SUSTAINABILITY					
Average NGO Score on I/M Scale					
Total Funds Generated by NGOs (Tk)					

TABLE II

Table II is based upon the former Table III-1 (Summary of NGO Project Activities and Outputs) and Table II-1c (Financial Sustainability).

- It is no longer organized by Q, E and S but by type of activity or input described (a more accurate reflection of the contents).
- The # clinics/sites using clinical and/or QAM standards are not reported since the only available information is whether quality manuals have been distributed to the clinics. The current effort to identify improved Quality indicators will address this issue for the following reporting period.
- Information on types of sites/projects is gathered from the various tables and grouped for presentation.
- Details on FP users by source and clinical method are not provided here so as to avoid duplication with Tables I and V.
- Only the MCH information identified as critical is provided. For example, # women and children receiving general treatment is not critical since some CAs do not provide such care and in some cases were reporting care provided by other providers located on the same site as their FP services.
- The training information is grouped and presented so as to provide information on type of training as well as type of personnel trained.
- NGO revenue generation information is presented, but CA funds budgeted/expended are excluded since the information is provided in Table III.
- Information on CA cost-reduction and efficiency measures and new implementation techniques is not presented since no clear definition of such measures is known and therefore useful comparisons cannot be made.
- Activities are only reported against the operational targets which are used for project management.

TABLE II - ACTIVITIES SUMMARY

ACTIVITY	LAST PER.	THIS PER.	% CHANGE	YEAR TARGET	% TARGET ACHIEVED
I. SERVICE DELIVERY SITES					
Total # NGOs [Projects] # CBD Projects # CBD + Mini-Clinics Projects # CBD + Full Clinic # Full Clinics # Satellite Clinics Held # NGOs that are Depot Holders # NGOs using Volunteers # NGOs using TBAs Total # Sites (incl. sites added this period) # Sites Expanding in Area During Period # New Sites During Period					
II. REPRODUCTIVE HEALTH & MCH SERVICES					
# Low Parity Couples # LP Couples Using FP Method # Newlyweds # Newlyweds Using FP Method # Clients Referred for RTI % RTI Referrals Confirmed Treated # Women Immunized # Children < 5 Immunized # Women Receiving Postnatal Care # Women Attending Health Education Sessions					

ACTIVITY	LAST PER.	THIS PER.	% CHANGE	YEAR TARGET	% TARGET ACHIEVED
III. FUND GENERATION					
Total Funds Generated by NGOs					
% NGO-generated Funds Expended					
% NGO-generated Funds Saved in Bank					
Total Value of Non-cash Donations to NGOs (Tk)					
IV. TRAINING					
# FWs Received Basic Training Refresher Trng					
# Supervisors Recvd Basic Refresher					
# Managers Recvd Basic Refresher					
# Office Assts Recvd Basic Refresher					
# Community Vol's Basic Refresher					
# Physicians Recvd Clinical FP Trng Interpers. Commun.					
# Paramedics/FWVs in Clinical FP Interpers. Commun.					
# Med. Interns in Clinical FP					

TABLE III

Table III is almost identical to former Table IV-1 (Summary Expenditures in Relation to Budget).

- A "Total" row has been added.
- The last two columns have been switched so that the "Balance Unexpended" can be seen at a glance.

TABLE III - EXPENDITURES IN RELATION TO BUDGET

BUDGET CATEGORY	EXPEND . LAST PERIOD	EXPEND. THIS PERIOD	EXPEND. Y-T-D	THIS YEAR'S BUDGET	% YEAR'S BUDGET REACHED	CUMULATIVE EXPEND. (FY92- Pres.)	TOTAL FIVE-YEAR BUDGET	% FIVE-YEAR BUDGET EXPENDED	BALANCE UNEXPENDED
Subproject Support									
Functional Specialty									
Program Support									
Training Internat'l Local*									
Procurement									
Evaluation									
Audit									
Indirect Cost Rate									
TOTAL									

*Breakdown for international vs. local training may not be available and is optional.

TABLE IV

Table IV is based on the former Annexure C-1 (Summary of NGO Project Personnel by Category, Sex and Full-Time or Part-Time Status at End of Current Project Year).

- Since the staffing patterns are established in the Project Proposal, "last year" and "this year" figures should not vary too much and should be close to the "target," and the "% current year target achieved" should be close to 100; therefore, it is proposed to present only "Expected" and "Current" for the different types of staff.
- There are no targets for male and female by full- and part-time staff; therefore, in this table only one column is added for "% women" by category of staff.
- Personnel have been grouped into salaried staff and community workers. Volunteers have been moved to the Community Workers category.

TABLE IV - PERSONNEL

CATEGORY OF PERSONNEL	EXPECTED		CURRENT YEAR		
	FULL-TIME	PART-TIME	FULL-TIME	PART-TIME	% WOMEN
I. SALARIED PERSONNEL					
Field Staff					
Medical					
Management					
Support					
TOTAL					
II. COMMUNITY WORKERS					
Volunteers					
Board Members					
Organization Members					
TOTAL					

*NB: Should TBAs be included?

TABLE V

Table V is almost identical to former Annexure A-1 (Active Users by Method and Cost per Active User During Six-Month Period).

- Information on each method is now provided by Project Source and Other Source.
- A column for Total Active Users by NGO has been added.
- A total row (for total Active Users by method and source and average cost per AU across all NGOs) has been added.
- Average Cost per User is not considered to be a very useful measure, since there is no fixed definition that is used by all CAs. A clear definition and standard method of calculation are needed if it is to be reported.

TABLE V - NGO ACTIVE USERS BY METHOD, SOURCE (PROJECT/OTHER), AND COST

NAME OF NGO	PILL		CONDOM		INJECTABLE		LIGATION		VASECTOMY		NORPLANT		OTHER (name)		TOT. A.U.	AVERAGE COST PER A.U.
	PS	OS	PS	OS	PS	OS	PS	OS	PS	OS	PS	OS	PS	OS		
(Name)																
Prev. Period																
This Period																
(Name)																
Prev. Period																
This Period																
(etc.)																
TOTAL																

ADDITIONAL TABLES

Audits, Evaluations, Waivers

With regard to three tables in the original semi-annual report (Table V-1, CA and NGO Audits; Table VI-1, CA and NGO Evaluations and Management Assessments; and Table VII-1, Waivers Pending Approval and Waivers Anticipated Next Six Months), the comment was made that there is often nothing (or little) to report in any of these areas for a particular CA during a particular period, and therefore:

- The information should only be presented annually.
- The information should be presented in a narrative.

However, these suggestions may not meet USAID's needs. Clarification is required from USAID as to whether:

- USAID needs waiver information semi-annually, or whether an annual projection for waivers as well as audits and evaluations is enough.
- USAID's principal use for the audit and evaluation information lies either (a) in the overall (or outstanding) recommendations -- in which case a narrative is more appropriate -- or (b) in numbers that can be aggregated across CAs (such as number or % of NGOs having planned an MDA, # or % planned and completed, etc.) -- in which case a table is more appropriate and the "Recommendations" column may not even be necessary.

If a narrative report for these areas is deemed acceptable, the table of contents of the semi-annual report will be revised to incorporate the information in a narrative format, in order to ensure that all CAs address these areas in their (annual) report, even if only to say that no relevant activities were carried out during that reporting period.

It may also be advisable to outline the information that would be in the narrative section, so that comparisons can easily be made if necessary. For example, a narrative section on Evaluations might begin with a summary of total number of evaluations taking place during the period by type of evaluation (internal or external; baseline, midterm, final; MDA) and % of NGOs that were evaluated before getting into a detailed description by NGO of each evaluation (when and for how long it took place, what the findings were, what recommendations are outstanding, etc.)

Innovative Techniques

Similar to the Audit, Evaluation, and Waiver tables, the information on innovative/new implementation techniques (formerly Table III-2 and Table III-3) may be more easily presented annually and in a narrative form.

- In the current two-table form, it is very difficult to cross-reference NGO projects testing vs using different techniques.
- The numbers of NGO projects either testing or implementing innovative techniques are quite small and therefore the majority of the cells in the current tables are Not Applicable.

It is recommended to present the information in a narrative. This could provide a summary of the # and % of NGOs involved in any innovative activity with specific details by NGO.

Note: There needs to be clarification of the definition of "testing innovative/new implementation activities" and "using innovative/new implementation techniques that have been tested and disseminated."

ANNEX III: CA MIS NEEDS

The following comments summarize, in brief, the needs of the CAs as observed and discussed during the TDY.

A. General Observations

The MIS are primarily monitoring systems that produce reports generally for upper-level or external audiences. Comparisons among reporting units are mostly lacking, as are useful linkages to other subsystems, such as finance. In general, feedback consists of corrections and monitoring visits, and there appears to be minimal regular dissemination of aggregated information from the central level downwards.

There needs to be more *useful* information at all levels, as well as the staff skills to interpret the information and use it for planning and evaluation. This implies a need for training, feedback, and decentralization of information and of decision-making where possible, as well as of meaningful information for internal purposes rather than simply to meet external reporting requirements. It is hoped that the QES indicators that will be adopted following the pilot test will help meet the latter need for meaningful information for planning and evaluation purposes.

B. AVSC

AVSC's management systems will be reviewed and reorganized under the auspices of AVSC head office in the spring of 1994, in preparation for which the Country Representative will be putting together his ideas for their MIS in early 1994. Although the specific changes that may be implemented following the reorganization are not yet known, it is clear that databases need to be set up and managed, and database management training needs to be provided. The incomplete staffing of the country office (two vacant positions) has held up the full implementation of the MIS; a data entry person is needed. In addition, although there is adequate circulation of reports at the country and regional office levels, feedback to lower levels and use of the information could be improved via management training in the use of data for decision-making for staff at different levels.

C. FPAB

FPAB has two parallel MIS: one for USAID-funded activities, one for IPPF. Neither is computerized at the time being, apart from the logistics database that exists for the USAID sites. There is currently a lack of staff and of adequate hardware to meet the needs for programming and data entry. Ideally, given the volume of work, there should be a full-time data entry person, in addition to the MIS staffer and his assistant. Another computer is needed in addition to the existing (low-performance) one; this computer should be a 486 with a minimum of 33 Mghz, with at least 8 Megabytes of RAM and a 200-Meg hard disk (and preferably a super-VGA color monitor), capable of storing the necessary databases (service statistics, logistics, etc.) and processing them quickly. With these resources, the MIS staff should be able to set up the necessary structures for processing and analyzing FPAB data.

Since the development of computerized systems is *not* fully underway, and since the IPPF MIS is expected to be computerized in future, development of databases that can meet both IPPF and USAID's needs should be considered, to allow a pooling of resources in terms of time, personnel, and cost, as well as to facilitate aggregation and disaggregation of data. Currently, the information for both IPPF and USAID reports comes from the same sources and forms but is compiled into separate reports at the district level. It is therefore conceivable that the data could be contained in the same database(s) with differing reporting

outputs for the different donors. This process could assist greatly in streamlining FPAB's MIS. IPPF will be conducting a review of FPAB in early 1994; FPMD/MIS will hope to coordinate with the IPPF team.

Finally, MIS training for FPAB staff will assist in the use of the information.

D. FPSTC

The MIS unit at FPSTC is amply staffed and has well-developed, highly centralized systems, which produce regularly a variety of internal management reports. The unit hopes to integrate information from the finance/accounting subsystems with its databases, which would be quite useful. It will be important for the unit to provide feedback reports to field sites on a regular basis, as well as to develop more fully a training database that meets both reporting needs and identifies personnel for refresher and other training. Training reports should be sent to other CAs which send personnel for training at FPSTC. In addition, given the human and material resources available in this unit, it should be possible -- and would be useful -- to decentralize the unit by providing computer access (even by locating computers in program offices) and training in the use of microcomputers to other FPSTC staff.

E. PFI

Pathfinder's MIS staff was recently augmented by one, which will facilitate maintenance of databases and should allow field visits in future (the first-ever MIS monitoring visit to the field took place after the arrival of the new staff member). It will be important for Pathfinder's MIS staff to create and maintain contact with field staff, since this area has been somewhat lacking due to the shortage of personnel, and has taken place only through project quarterly meetings, which only Project Managers attend. Pathfinder will pilot test the quality and expansion indicators, and has already begun identifying data availability and needs for the indicators being tested.

F. TAF

Currently, the primary report produced by TAF's MIS is the semi-annual report to USAID. Regular internal reports and feedback have been difficult to provide since there is no full-time person responsible for data entry. The MIS unit would like to be able to serve as an internal service for its program officers in their planning and evaluation work, as well as to provide technical assistance to NGOs. Once the QES indicators have been finalized, more useful information for these purposes should be available. It will then be essential to provide training in data analysis and the use of data for decision-making, both at the central and field levels. It will be important, as well, for TAF to develop useful management reports and to produce and disseminate them regularly.

ANNEX IV: LIST OF CONTACTS

USAID/Dhaka, Office of Health and Population

Mr. William Goldman, Chief
Mr. David Piet, Deputy Director
Mr. Alan Foose, Population Officer
Mr. Quasem Bhuyan, Project Management Specialist
Ms. Louisa Gomes, Project Management Specialist

AVSC

Dr. Abu Jamil Faisel, Country Representative
Dr. Sukanta Sarker, Senior Program Officer

FPAB

Mr. Mukarram Chowdhury, Director General
Mr. Mizanur Rahman, Deputy Director General
Ms. Shamima Hasam, Deputy Director, USAID
Mr. Kazi Mohammad Ali Jinnah, Asst Dir, USAID
Mr. Ershad-ul Huq, Program Officer/MIS

FPSTC

Mr. Abder Rouf, Chief Executive
Mr. Rafique Ahmed, Program Officer/MIS
Ms. Lulu Bilkis, MIS

PFI

Dr. M. Alauddin, Country Representative
Mr. Saiful Islam, Program Manager
Mr. Ahmed Sultanur Reza, Program Officer/MIS
Mr. Kamrul Hossain, Program Officer/MIS

TAF

Ms. Kirsten Lundeen, Program Manager
Mr. Shaheed Mahbub Hossain, Program Officer/MIS
Mr. Golam Faruque, Asst. Program Officer/MIS

**FAMILY
PLANNING
MANAGEMENT
DEVELOPMENT**

FPMD
Management Sciences for Health
400 Centre Street
Newton, MA 02158, U.S.A.

MEMORANDUM

January 12, 1994

To: Kristen Lundeen	The Asia Foundation/Dhaka
Shaheed Mahbub Hossain	The Asia Foundation
Dr. A. Jamil Faisel	Association for Voluntary Surgical Contraception/Dhaka
Nancy Piet-Pelon	AVSC/Dhaka
Sukanta Sarker	AVSC/Dhaka
Jane Wickstrom	AVSC/New York
Evie Landry	AVSC/New York
Md. Nazrul Haq	Family Planning Association of Bangladesh/FBAB
Shamima Hasan	FPAB
Ershadul Huq	FPAB
Abdur Rouf	Family Planning Services and Training Centre/FPSTC
Rafique Ahmed	FPSTC
Jaime Benavente	Pathfinder International/Watertown
M. Alauddin	Pathfinder International/Dhaka
Ahmed Sultanur Reza	Pathfinder International/Dhaka
Robert Timmons	Pathfinder International/Istanbul
Alan Foose	USAID/Dhaka
Louisa Gomes	USAID/Dhaka
Quasem Bhuyan	USAID/Dhaka
Maria Busquets-Moura/Charlotte Ureksoy	AID/Washington
Keys MacManus	AID/Washington
Adrienne Allison	CEDPA
Nate Wooley	POL/CDIE/DI, AID
Zynia Rionda	AID/Washington

From: *Alison Ellis, Regional Director, Asia/Near East, FPMD*

Enclosed for your information and review is a copy of the trip report covering the visit to Bangladesh of Hillard Davis and Margaret Watt during November 21 - December 9, 1993. Please contact me if you have any questions or comments.