

PROGRAM EVALUATION IN KENYA

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FAMILY PLANNING MANAGEMENT DEVELOPMENT

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I. EXECUTIVE SUMMARY

Sallie Craig Huber, Evaluation Consultant to FPMD, visited Kenya from January 19-February 5, 1994. Although it was the consultant's first visit to Kenya for FPMD, the purpose of the trip was to continue ongoing and plan future evaluation activities for the various FPMD technical assistance interventions in that country. This visit coincided with that of the FPMD Project Director and Africa Regional Director for the review of Management Development Plans (MDP) for the next two-year period.

The consultant undertook an assessment of the experience with testing the Continuing Assessment of Management Effectiveness and Organizational Change (CAMEO) in three partner organizations in Kenya. This review included discussions with key staff of each of the three organizations and a determination of continuing activities related to the CAMEO experiment.

Kenya subproject documentation was reviewed and catalogued for the upcoming mid-term evaluation of the FPMD project. This activity also included the collection of information about the results of FPMD subprojects with the Seventh Day Adventist/Rural Health Services (SDA/RHS) and the Diocese of Maseno West/Christian Community Services (CCS) for publication in a continuing series of FPMD brag sheets.

Finally, the consultant worked with the FPMD/Kenya staff on the development of specific objective and output indicators for all activities included in the MDPs for FPMD's next two years of work in Kenya.

II. BACKGROUND

FPMD and its predecessor project, FPMT, have provided technical assistance in Kenya since 1987. Presently this technical assistance is extended to six non-governmental organizations (NGO) and to one governmental agency. The first two years of technical assistance to these organizations under the current FPMD project was completed in September 1993 and new Management Development Plans (MDP) for the balance of the FPMD project (until September 1995) have been drafted.

A special FPMD evaluation activity, known as Continuing Assessment of Management Effectiveness and Organizational Change (CAMEO), was designed by the FPMD Evaluation Unit and tested in three of FPMD's partner organizations in Kenya during 1992-1993. Several previous evaluation visits have been made with a focus on this effort. These visits and the resulting findings are described in trip reports and reports of in-country consultants listed in the Bibliography section of this report.

III. PURPOSE

This was the first trip of this Evaluation Consultant to review the work of FPMD in Kenya. The scope of work for the visit can be summarized as follows: (See Annex I for the full scope of work).

1. A review of FPMD's ongoing program and process evaluation efforts in Kenya to assess future directions for these efforts,
2. Preparation of documentation and reference materials for FPMD's upcoming mid-term evaluation, and
3. Development of plans for continuing evaluation efforts over the next two years including preparation of specific objectives and output indicators to be incorporated into the new MDPs with each organization.

IV. ACTIVITIES

The consultant attended most of the MDP review meetings undertaken by the FPMD Project Director and Africa Regional Director who were in Kenya at the same time. In addition, the consultant held separate meetings to discuss evaluation activities and needs with the representatives each FPMD-partner organization except Mkomani and Maendeleo Ya Wanawake. Meetings were also held with the two in-country consultants who worked on the CAMEO system and extensive discussions were held with the managers and key users of CAMEO in the three participating organizations--National Council for Population and Development (NCPD), Family Planning Association of Kenya (FPAK), and Christian Health Association of Kenya (CHAK).

In separate meetings with the Project Directors of two of the subprojects--Seventh Day Adventist/Rural Health Services (SDA/RHS) and the Diocese of Maseno West/Christian Community Services (CCS)--information was collected for FPMD brag sheets about the accomplishments of these two organizations. A separate meeting was held with Pathfinder International to discuss their inputs to the Maseno West CCS project so that the above mentioned brag sheet for that project can be prepared jointly by FPMD and Pathfinder.

Project files for all ongoing projects in Kenya were reviewed to ensure that necessary documentation and information is available in preparation for FPMD's mid-term evaluation. The consultant had a debriefing with USAID on February 3 to review activities and findings of the visit. See Annex II for list of contacts in Kenya.

V. FINDINGS

A. CAMEO

The following questions were used to guide discussions of the CAMEO system for the evaluation of FPMD's work with three participating organizations--CHAK, FPAK, and NCPD. (This system is described in detail in the FPMD references listed in the appended Bibliography. In-country consultants and FPMD staff were also interviewed to assess their experience with using CAMEO.

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- What is your understanding of the CAMEO system? Does this system have merits as a monitoring and assessment system for the organizations which used it in Kenya?
- Should CAMEO continue as an ongoing system for use by participating organizations or was it intended for use only by FPMD for a limited period?
- Was the time allotted for the test of CAMEO adequate?
- Was the cost and involvement of external consultants useful/ justified?
- Can CAMEO be combined with the Activity Monitoring Systems being developed by FPMD with some of the organizations in Kenya? With any other existing monitoring/evaluation systems of these organizations? If so, is continued technical assistance required?
- Does CAMEO assist in making the linkages between FPMD interventions and service delivery outputs? Can/should it?

1. Understanding and Merits of CAMEO

All three organizations felt that the CAMEO system facilitated the structuring and implementation of FPMD-assisted interventions. They acknowledged that CAMEO forced them to think analytically about their achievements in the development and application of these interventions. However, the organizations and the consultants employed to provide technical assistance felt the CAMEO system was complex, time-consuming and cumbersome.

There was a general sense among the participating organizations and the local FPMD staff that this system was externally imposed by FPMD headquarters staff without full consultation with the parties involved. This understanding may have had some bearing on the difficulty one of the consultants had in gaining the cooperation of the participating organization with whom he was working. Although the participating organization staff understood the system was designed to evaluate FPMD interventions, they did not fully understand the application of the concept at its initiation.

The introduction of the CAMEO concept to the participating organizations was too centralized--FPMD worked primarily with the Management Information or Research and Evaluation Unit staff in the participating organizations. Introductory workshops or seminars would have been very useful in creating a general understanding of the concept and strategy among all management and technical staff in the participating organizations.

2. CAMEO: A Continuing System or a One-Time Pilot

The original intent for the continuation of CAMEO was not clearly understood by any of the participating organizations. A few of the "user" staff at one of the organizations were reported by a consultant to that organization to have assumed that the final meeting in December 1993 to review CAMEO results was the end of the process. When questioned during this visit, the participating organizations did not have a clear picture about whether technical assistance with CAMEO had been completed or exactly what was expected next with regard to this system.

3. Time Allotted for Testing CAMEO

The participating organizations and consultants were unanimous in their response that the time allotted was too short to fully institutionalize the CAMEO process. Organizational staff and consultants all felt pressured to produce results within the given timeframe, which was extended beyond the time originally planned in any case. Furthermore, the timing of the introduction was felt to conflict with the introduction and implementation of other similar and related systems in one of the organizations and to be premature in another since the mission and role of that organization was in flux at the time of introduction.

An example was given of the extensive time and FPMD technical assistance provided for the introduction and institutionalization of other systems similar to CAMEO. This time and cost effort expended in the development of the other systems, however, was felt to be warranted by the fact that those systems were requested by the organizations and jointly developed with FPMD rather than being externally imposed, which is how the partner organizations saw CAMEO.

4. External Technical Assistance: Role and Cost

While the participating organizations were grateful to the in-country consultants for assisting them through the CAMEO exercise, they also indicated the technical assistance provided was somewhat less than satisfactory as the consultants were not felt to have a full understanding or grasp of the intent or the application of CAMEO. The consultants themselves felt their roles were not clearly defined and one indicated there was a change in the scope of work over the time of the assistance (whether this change was sanctioned by FPMD or a change only in the eyes of the consultant was not clarified). The cost for in-country technical assistance for CAMEO amounted to nearly \$23,200. This does not include the cost of at least three technical assistance visits by the Evaluation Director from headquarters and other time of headquarters and Nairobi staff. Several individuals in Kenya questioned the feasibility of this expense for a system that was not clearly defined or fully planned with the participating organizations as an ongoing institutionalized activity.

5. Combine CAMEO with Other Ongoing Monitoring Systems

The most likely system with which to combine CAMEO in all three of these organizations is the FPMD-assisted Activity Monitoring System (AMS). Although the latter is designed to assist with project monitoring rather than to assess process monitoring, as is the case with CAMEO, elements of process monitoring can be usefully and productively incorporated into the AMS.

CHAK expressed an interest in continuing to use CAMEO as an adjunct to their newly developed internal monitoring system. This system is comprised of the following elements:

- monthly unit meetings to examine progress against workplans;
- quarterly Project Performance Monitoring of each unit's activities and outputs by a committee of senior managers; and
- an annual review and planning session to review past activities and, based on progress to date, to develop the next year's workplan.

Although the first two components of this system are operating at a certain level now, the third is not yet fully institutionalized.

CHAK would like continuing technical assistance from FPMD to develop indicators for all workplan activities to serve as a guide in the implementation of this internal monitoring process. This can be carried out in concert with FPMD's planned technical assistance to CHAK in its restructuring process since the organization desires to continue the ongoing monitoring of its projects and activities while it is undergoing restructuring.

FPAK is applying a "mini-CAMEO" analysis already to the implementation of its Quarterly Reporting System, which includes AMS as well as service statistics and financial reporting. This organization would like continued technical assistance from FPMD to work with its various units to subdivide CAMEO into various program components. This would include continuation of work initiated with the Supply and Logistics section in June 1993 on development and application of indicators for monitoring their work. Furthermore, FPMD is requested to assist the Research and Evaluation Unit to develop a system to incorporate the use of CAMEO in quarterly staff review meetings.

NCPD feels CAMEO as presented and applied to monitor their FPMD-assisted systems was not flexible enough to meet the organization's monitoring needs. NCPD staff feel CAMEO should be adaptable to changes in the organization and in the implementation of FPMD interventions. NCPD stated they will continue to use CAMEO in future but with flexibility and on their own terms, e.g. it will be a tool they will apply periodically rather than continuously. Some observers in Kenya doubt

this will occur spontaneously, however, and FPMD was not requested to provide continuing assistance in this area.

6. Linkages with Service Delivery Outputs

The Kenya Technical Review criticized the CAMEO concept for not adequately measuring FPMD impact on service delivery. Whether this linkage was ever the intent of CAMEO is debatable. USAID/Nairobi does not feel that FPMD needs to quantify service delivery output linkages with its work. In fact, they expressed the opinion that rigid collection and analysis of quantitative data sometimes detracts from and limits provision of services. They informed this consultant that they feel it is sufficient to be able to make qualitative connections between FPMD's work and resulting improved or expanded services in Kenya. In spite of these differing opinions about the need to link management interventions with service delivery outputs, questions were posed during this visit to the participating organizations and consultants about whether they thought CAMEO could be adapted for this purpose.

While CAMEO users recognize that an increased awareness of program outcome through enhanced management skills should automatically lead to improved and/or expanded services, CAMEO was not able to specifically document these linkages in any of the participating organizations. For example, NCPD sees the FPMD-assisted MIS as an end in itself rather than as a tool to improve services. However, since NCPD is not directly responsible for the delivery of services, this finding should not necessarily come as a surprise.

The leadership of the other participating organizations were able to cite opinions about the impact of certain elements of FPMD's work on enhanced services. The Executive Director of Maseno West/CCS reported that since their improved service statistics system has been able to provide data feedback, they have used these data to review performance in monthly meetings with CBD and clinic staff. This has encouraged increased services and has also served as an incentive for staff to improve performance. SDA/RHS leadership cited FPMD assistance with streamlining the organization's existing systems to enhance, increase and allow documentation of cost recovery efforts in support of expanded services.

7. Summary-CAMEO

The Technical Review of FPMD's work in Kenya, undertaken in October 1993, presented two recommendations regarding the CAMEO system. These are paraphrased below:

- CAMEO should be merged with the much simpler activity monitoring systems of these organizations so they have an integrated monitoring system which

responds to their own internal management needs as well as their needs to report on progress in various activities to external donors and for the National Activity Monitoring System of the NCPD.

- Evaluation of FPMD's work in Kenya must make the linkage between technical assistance in management activities and impact on the organization's ability to deliver services.

The latter recommendation calls for the development of a methodological framework to identify the specific linkages in each organization between FPMD interventions and organizational outputs. The preceding section comments on the second recommendation. Findings and conclusions related to the first are summarized below.

The findings of this consultancy visit point to the need to take another look at CAMEO as a system for use by FPMD. While all three participating organizations felt the CAMEO concept has merit in promoting analytical thinking among management staff, the process by which the system was introduced and applied needs rethinking. In particular, the organizations which participated in the initial application of this system expressed some concerns about the limited time allowed for testing the system and appealed for greater flexibility of system design as well as greater participation in decision-making about its application within their organizations. Both CHAK and FPAK desire continued technical assistance from FPMD to apply certain elements of CAMEO (the delineation of indicators and regular review of their achievement) to their ongoing internal monitoring efforts. It is less clear if or how NCPD may continue with the application of any elements of the CAMEO system in the ongoing monitoring of its activities.

B. Preparation for FPMD Mid-Term Evaluation

This activity included two separate, but related, activities. First the consultant reviewed the past Management Development Plans (MDP) for each subproject to determine the expected outcome of each activity or intervention and located the corresponding documentation. These are listed in Annex III. This exercise was enhanced by a review of the FPMD/Kenya Quarterly Report for July-September 1993, which presents in narrative form the overall achievements on each MDP. In general, all planned activities were achieved or addressed by incorporating them into other activities within the MDP.

The second activity related to preparation for the Mid-Term Evaluation was the collection of information for the preparation of two FPMD brag sheets about the accomplishments of subprojects with the SDA/RHS and Maseno West/CCS. These will be prepared by FPMD Publications Unit to document unique aspects and the outcome to date of FPMD's work with these two organizations. The document about CCS will be developed in collaboration with Pathfinder International, which funds service activities of that organization.

C. Plans for the Future of FPMD Evaluation in Kenya

Based on the review described in the preceding section and also the findings and recommendations of the Technical Review for Kenya undertaken in October 1993, plans for future evaluation activities in Kenya were discussed and drafted. Following discussions held between the FPMD Project Director and Africa Regional Director and each of the partner organizations to agree of specific activities, draft MDPs were reviewed by the consultant with FPMD/Kenya staff to develop specific objectives and output indicators for each activity. These are presented below, for each organization. Where an individual activity proposed in the new MDP responds to a specific recommendation in the Technical Review, this is also noted below (indicated as **TR RECOMMENDATION**).

1. Resource Expansion Workshop

One activity is planned which will cut across all of the organizations assisted by FPMD in Kenya and will also include other organizations which are not assisted by FPMD. This is a workshop of resource expansion, the objective of which is to encourage sharing of experiences and development of new concepts of cost recovery among the health and family planning NGOs working in Kenya.

Indicators of the achievement of this objective include the following:

- Report of the workshop;
- Feedback from workshop participants on successful application of cost recovery activities.

2. Family Planning Association of Kenya (FPAK)

TR RECOMMENDATION-FPMD continues to work with FPAK to determine ways that their financial dependence on donors can be reduced over the next 5 years.

The new MDP proposes FPMD assistance in planning and implementation of a resource expansion workshop to encourage sharing of experiences and development of new concepts of cost recovery among the health and family planning NGOs working in Kenya.

Achievement of this objective will be indicated by the following outputs:

- Report of the workshop;
- Feedback from workshop participants on successful application of cost recovery activities;

TR RECOMMENDATION-FPMD ensures that all management systems that have been developed for FPAK are well documented so that they can be institutionalized and not need external assistance when they require modifications.

FPMD will assist FPAK in further development of the Quarterly Reporting System and in the development of a supplies inventory system to enhance FPAK's capacity to plan, monitor and report on its various activities. Under the new MDP, FPMD also will assist FPAK with their Financial Management System. The objective of this effort will be to assist FPAK to streamline, review and institutionalize its financial management system, in collaboration with IPPF/London.

These objectives will be achieved as indicated by the following:

- All elements of the Quarterly Reporting and Financial Management Systems are fully computerized and documented with manuals for their operation;
- A supplies inventory system is developed, documented and implemented;
- Adequate and appropriate staff are trained to use the systems;
- Information produced by the systems is used as intended;
- Report of year-end (1993) review of financial system implementation;
- Periodic reports submitted by the financial management consultant.

TR RECOMMENDATION-FPMD continues to work with FPAK to determine ways that the board can be more effectively used to sustain and stabilize the organization over the long term.

In the next program phase, FPMD plans to assist FPAK with the finalization, approval and introduction of a strategic plan to direct overall organizational policy and program decisions and to guide in the preparation of the next three-year workplan.

Indicators of the achievement of this objective include:

- Strategic plan is finalized, approved and printed;
- Report of donor review meeting of the Plan;
- Three-year workplan is developed based on the Strategic Plan;
- Strategic Plan is reviewed after approximately one year and revised, if necessary.

TR RECOMMENDATION- FPMD continues to work with FPAK to find ways that the lessons learned by FPAK can be effectively shared with other family planning organizations in Kenya and other countries in the region.

This recommendation will be addressed by the planned workshop described in the preceding section (V.C.1) to share lessons learned from family planning and health projects on resource expansion and self-sufficiency.

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THE FOLLOWING PROPOSED MDP ACTIVITIES ARE NOT COVERED BY TECHNICAL REVIEW RECOMMENDATIONS, PRIMARILY BECAUSE THEY RELATE TO NEW ACTIVITIES:

Client Mapping

This activity, proposed as a result of the *Family Planning Manager* (Vol I, No. 5-Nov/Dec 1992) issue on this topic attracting the attention of FPAK, will be undertaken by FPMD to assist in designing and testing an adaptation of the ELCO (eligible couple) Mapping system developed by FPMD in Bangladesh in FPAK's CBD program.

Indicators of successful accomplishment of this activity will include:

- Report of technical assistance visit from FPMD/Bangladesh program officer;
- Reports of pilot test experience in Kenya.

Decentralization of FPAK Administration

FPMD assistance is sought to enable FPAK to enhance the institutionalization of management interventions and increase local decision making through the development and implementation of a pilot scheme for decentralization of management information systems in selected Area Offices.

Achievement of this objective will be indicated by the following:

- Documentation of pilot scheme plans;
- Periodic reports of the results and impact of the pilot test with recommendations for future action on decentralization.

Monitoring and Evaluation (including CAMEO)

FPMD will assist FPAK with activities to improve monitoring and assessment of staff performance using established job descriptions.

Achievement of this objective will be measured by the following output indicators:

- System is developed and documented;
- System is used for periodic performance reviews.

As a result of this consultant visit, FPMD also has been requested to assist FPAK with application of elements of the CAMEO system to their ongoing internal monitoring efforts.

The following outputs will indicate successful achievement of this objective:

- Indicators are developed and used to assist in the internal monitoring of FPAK's ongoing program activities and management systems;
- Management have internalized the use of indicators established to assist with internal monitoring processes.

3. Seventh Day Adventist/Rural Health Services (SDA/RHS)

TR RECOMMENDATION-A major focus of the work with SDA is the institutionalization of the management systems that have been developed to be less dependent on an individual manager.

Continued work with SDA on their management systems is described below. However, over and above those specific technical assistance objectives, FPMD will also assist this organization with ongoing efforts to utilize its Strategic Plan, which is aimed at improving the organization's capacity to efficiently deliver family planning and related health services, in developing annual activity and financial plans.

Indicators of the achievement of this objective will include:

- Report(s) of Strategic Plan review session(s) held during the life of the MDP;
- Activity and financial plans, based on Strategic Plan, produced for 1994 and 1995.

TR RECOMMENDATION-The SDA model can be written up and used as a model for other organizations that are looking for fee-collection systems in remote, rural areas. This might include Maseno West and CHAK, among others.

Two proposed activities relate to this recommendation. One is a continuation of technical assistance in application of a financial management system which is designed to improve SDA/RHS's long term capacity to provide health and family planning services through an upgraded financial management and accounting system and expanded resource and donor base.

Indicators signifying the achievement of this objective are:

- Report(s) of financial management system review(s) and revised procedures manual (if indicated by the review);
- Adequate and appropriate staff trained to manage the system;
- Information produced by the system is used as intended.

- Reports of field visits to review use of the financial system;
- Monitoring reports of income generation by source.

The second activity related to this recommendation is the proposed preparation of an FPMD brag sheet about the success of this project with cost recovery. This will be carried out by FPMD Publications Unit in consultation with SDA and FPMD/Kenya.

TR RECOMMENDATION-Continue to work with SDA/RHS staff to develop an MIS that will meet its organizational management needs in addition to the reporting requirements of donors.

TR RECOMMENDATION-Assignments of personnel to the MIS be reviewed to determine the number and capabilities required to operate an effective system.

Activities planned in response to these two recommendations include assisting SDA/RHS with the development of systems for continuous and accurate data collection and analysis for use in planning, monitoring, budgeting and donor reporting and the provision of computers and related equipment.

Indicators of the achievement of this multifaceted objective will include:

- Family planning service statistics system is fully computerized and manual is developed;
- Supervisory system and related manual are developed;
- Both systems are piloted and revised according to results of the pilot;
- Adequate and appropriate staff are trained in use of both systems;
- Information from both systems is used as intended;
- Computers delivered, installed and in use.

4. Christian Health Association of Kenya (CHAK)

TR RECOMMENDATION-Focus attention on the phasing out of financial assistance to the Management Support Unit during the next 12-18 months.

TR RECOMMENDATION-A study be conducted detailing member units' perception of CHAK, and the units' needs for assistance. This will enable CHAK to move into new areas where demand is high. It could be done in the context of a planning exercise as part of an assessment of the external environment which CHAK faces.

In response to the two recommendations outlined above and to the strongly felt needs of CHAK, FPMD has been requested to assist in the preparation and introduction of a plan for organizational restructuring which includes a proposal and financial plan for implementation.

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Achievement of this activity will be indicated by the following outputs:

- Regular consultant team reports on progress of the restructuring plan;
- The approved restructuring plan and proposal;
- Introduction and application of the plan within the CHAK organization.

TR RECOMMENDATION-A fee structure be established with CHAK for the provision of services to its member units based on the value of these units and their ability to pay.

TR RECOMMENDATION-CHAK should be assisted in working with the smaller units to develop appropriate fee structures so that these units can continue to provide the types of services required at the village level.

TR RECOMMENDATION-CHAK (should) explore ways that they can cross subsidize assistance to the small units that are perhaps most in need of assistance but will be unable to pay for technical assistance from CHAK for the foreseeable future.

FPMD assistance in the areas enumerated in the above three technical review recommendations above may be identified during the resource expansion workshop described in Section V.C.1 above.

TR RECOMMENDATION-FPMD (should) provide full documentation of the information systems that have been developed and identify the training needs of staff to ensure the sustainability of the systems which have been developed.

In an ongoing effort to assist CHAK to institutionalize the collection, analysis and use of information for planning, monitoring and reporting on its activities, FPMD will continue the support of an MIS consultant and work with CHAK in the further development of its service statistics system and its nascent internal monitoring system.

Indicators of the achievement of this objective for the next MDP will include:

- Periodic progress reports from the MIS consultant;
- Service statistics and activity monitoring systems are fully computerized and documented;
- Adequate and appropriate staff have been trained to use the systems;
- Other aspects of internal monitoring, including quarterly project performance monitoring and annual planning and review meetings, are operating as intended;
- Elements of CAMEO system (indicator checklists) are adapted and used in the internal monitoring system;
- Information produced by the systems is being used for its intended purposes.

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THE FOLLOWING PROPOSED MDP ACTIVITY IS NOT COVERED BY THE TECHNICAL REVIEW RECOMMENDATIONS:

A final activity with CHAK, which continues previous efforts, involves FPMD technical assistance to CHAK for two program planning and review meetings each year; one for the purpose of annual workplan review and development and the other to review/provide updates on a mutually determined management issue.

Output indicators for this activity will include:

- Reports of the meetings held;
- Annual workplans.

5. Maseno West/Christian Community Services (CCS)

TR RECOMMENDATION-FPMD support the Bishop's effort to spearhead the formation of a regional group that will transfer the lessons of to other neighboring areas of the country.

FPMD has been requested to assist with the design and production of a written management plan for establishment of the proposed pilot Western Regional CCS Office to coordinate Church of the Province of Kenya (CPK) development activities.

The following indicators will denote achievement of this objective:

- A written plan is produced and approved by church leadership;
- The Regional Office is staffed, funded and operating.

TR RECOMMENDATION- Maseno West is one of the few organizations providing family planning services through static clinics, mobile clinics, and CBD, and has a good financial management system. This would make it an ideal organization to do a comparison of costs of service delivery for each of these 3 modalities.

This recommendation will be addressed through the national workshop on resource expansion described above (Section V.C.1).

TR RECOMMENDATION-FPMD provide complete documentation of personnel and information systems to ensure the full institutionalization of these systems.

TR RECOMMENDATION-It is suggested that FPMD and Pathfinder revisit the CBD information gathering and reporting system to determine if it can be streamlined and made more effective and efficient in accurately reporting their activities.

In response to these two recommendations, FPMD has been requested to assist in

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development of computerized information systems for the collection and analysis of clinical and CBD service statistics and for improved management of commodity logistics inventory and distribution. In addition, FPMD will assist with the production of an upgraded, computerized financial system for use in managing all Maseno West/CCS financial transactions.

Indicators of the achievements of these related objectives are:

- Fully computerized and documented service statistics and commodity inventory systems are developed;
- A computerized financial management system is developed and documented with a procedures manual;
- Adequate and appropriate staff trained in use of all three systems;
- Contraceptive supplies are available at all service delivery points at all times;
- A commodities storekeeper is trained;
- Information produced by the systems is used as intended.

THE FOLLOWING PROPOSED MDP ACTIVITY IS NOT COVERED BY TECHNICAL REVIEW RECOMMENDATIONS, PRIMARILY BECAUSE IT IS A NEW ACTIVITY:

Strategic Planning

FPMD has been requested to assist CCS with the development of a strategic plan to guide the structure, financial status and development activities of the organization over the next three to five years.

This objective will be considered to have been achieved upon successfully fulfilling the following outputs:

- A written plan is developed, approved by staff and governing body, and used by these groups to guide the organization in carrying out its mission.

6. Mkomani Clinic Society

TR RECOMMENDATION-Other work with Mkomani be contingent on a meeting between Pathfinder, USAID, FPMD, the board and senior staff to address how the current issues between the board and staff are to be resolved. This must include benchmarks for progress and a timetable for achieving these benchmarks which will be the determinants for further funding.

TR RECOMMENDATION-FPMD continue to work with Mkomani only if Mkomani can commit to significant expansion of their services to meet the growing demand in the entire coast region. This would include expansion of the number of clinics, a much broader

outreach program, and the development of management systems appropriate to a large and healthy organization.

Under its renewed MDP, FPMD will assist the Board of Directors and senior managers of Mkomani Clinic Society with the articulation of an organizational vision and in the development of a related organizational mission statement.

This objective will be achieved as indicated by the following outputs:

- Report of the proceedings of the board/staff vision development retreat
- Written vision and mission statements

THE BALANCE OF ACTIVITIES PLANNED WITH MKOMANI WILL BE CONTINGENT ON THE RESULTS OF THE VISION EXERCISE DESCRIBED ABOVE; HOWEVER, THE ACTIVITIES OUTLINED BELOW ARE ILLUSTRATIVE OF POTENTIAL TECHNICAL ASSISTANCE INTERVENTIONS

TR RECOMMENDATION-FPMD (should) review the MISs to determine whether further automation of the data collections system would be more efficient.

TR RECOMMENDATION-FPMD (should) provide full documentation of the information systems that have been developed and identify the training needs of staff to ensure the sustainability of the systems which have been developed.

TR RECOMMENDATION-It is suggested that FPMD and Pathfinder revisit the CBD information gathering and reporting system to determine if it can be streamlined and made more effective and efficient in accurately reporting their activities.

TR RECOMMENDATION-It is recommended that Mkomani look into the feasibility of computerizing the registration process to make it more efficient and less time consuming to prepare reports.

FPMD will assist Mkomani Clinic Society to develop a capacity to produce continuous and accurate information on family planning services and financial matters for the purpose of planning, monitoring, and reporting.

Indicators of the achievement of this objective will include:

- Service statistics and financial systems are fully computerized and documented
- Adequate and appropriate staff are trained to use the systems
- Information produced by the systems is used as intended

THE FOLLOWING PROPOSED MDP ACTIVITY IS NOT COVERED BY TECHNICAL REVIEW RECOMMENDATIONS:

Resource Expansion

Continuing efforts begun during the previous MDP, FPMD will assist the Mkomani Clinic Society to strengthen its resource base through undertaking feasibility studies, a market analysis and preparation of budgets for resource expansion activities.

This objective will be achieved as indicated by the following outputs:

- Reports of feasibility studies and market analysis
- Budgets are approved and funds allocated by the Board and one or more resource expansion activities are underway

7. National Council on Population and Development

TR RECOMMENDATION-As the role of NCPD is clarified in the national program, a review of the systems that have been developed should be done to determine what modifications, if any, should be made. This review should include a participant from MIS/Boston who will be responsible for technical oversight of the projects and for the process of systems development.

As requested, FPMD will continue work on the review, development and institutionalization of management information systems and of the MIS unit at NCPD to strengthen organizational capacity to produce continuous and accurate information for the purpose of planning, monitoring and reporting in its various activity areas. This objective will include the provision of additional computers and related equipment.

Achievement of this objective will be indicated by the following outputs:

- Regular performance reports by FPMD-supported MIS consultant on the implementation of expected tasks and feedback from his supervisor
- All subsystems are fully computerized and documented
- Adequate and appropriate staff are trained to use the systems
- Information produced by the systems is used as intended
- Computers and other equipment is delivered, installed and in use

VI. Next Steps

The consultant will be available to review the finalized MDPs and to comment on any revisions in the objectives and indicators contained therein as needed. She will also coordinate with FPMD/Kenya staff over the next few months as implementation begins on

the new plans to determine whether external technical assistance is required to work with CHAK and FPAK, especially, on the extension and application of CAMEO elements into their ongoing internal monitoring activities. A return visit by the consultant is tentatively scheduled for the last quarter of 1994 to assess achievements to date in the implementation of new MDPs and progress in working with CHAK and FPAK on combining elements of CAMEO into their ongoing internal monitoring systems.



ACRONYMS

AMS	Activity Monitoring System
CAMEO	Continuous Assessment of Management Effectiveness and Organizational Change
CBD	Community Based Distribution
CCS	Christian Community Services
CHAK	Christian Health Association of Kenya
CPK	Church of the Province of Kenya
ELCO	Eligible Couples
FPAK	Family Planning Association of Kenya
FPMD	Family Planning Management Development
FPMT	Family Planning Management Training
IPPF	International Planned Parenthood Federation
MDP	Management Development Plan
MIS	Management Information System
NCPD	National Council on Population and Development
NGO	Non-Governmental Organization
RHS	Rural Health Services
SDA	Seventh Day Adventist
TR	Technical Review
USAID	United States Agency for International Development

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Bibliography

All the following are FPMD reports.

Breldan Consultants. "CAMEO: Continuing Assessment of Management Effectiveness in Organizations, Final Technical Report: Christian Health Association of Kenya (CHAK)." September 1993.

Breldan Consultants. "CAMEO: Continuing Assessment of Management Effectiveness in Organizations, Final Technical Report; Family Planning Association of Kenya (FPAK)." September 1993.

Benavente, Jaime; Baker, Jean; Fenn, Suzanne and Sturgis, Richard. "Kenya Assessment Visit." May 1992.

Benavente, Jaime. "Visit to Kenya for Implementation of Continuing Assessment Approach, NCPD-FPAK-CHAK." September 26 - October 13, 1992.

Benavente, Jaime. "Visit to Kenya for Assessment of Continuing Assessment Approach, NCPD-FPAK-CHAK." June 1993.

Inambao, A.W. "Report of the Evaluation of Family Planning Management Development Technical Assistance to the National Council for Population Development." 1993.

Mitchell, Marc, et.al. "Technical Review: Kenya." October 7-21, 1993.

ANNEX I

SCOPE OF WORK

Sallie Craig Huber, FPMD Evaluation Consultant will visit Kenya between January 17 and February 4, 1994 to carry out the following tasks:

- 1) Review the ongoing FPMD evaluation undertakings in Kenya, i.e. the activity monitoring system designed for use in tracking project activities by the participating organizations and the CAMEO system.
- 2) Examine the findings of both systems and prepare written documentation and lists of reference material for use by FPMD external evaluators.
- 3) Review the implementation of these systems to determine the feasibility of continuing part or all of these efforts. This activity will include:
 - a) Scheduling and attending a meeting with each of the three organizations participating in the CAMEO system (NCPD, FPAK, and CHAK) to review their use of and reaction to the systems and to determine necessary modifications and/or possible merger of the two systems;
 - b) Based on this review and working in collaboration with each organization, modify the systems as needed with assistance of the FPMD MIS Advisor.
- 4) Develop written plans for continued evaluation efforts over the next year with all the organizations being assisted by FPMD in Kenya.

ANNEX II

KENYA CONTACTS

Christian Health Association of Kenya (CHAK)

James B. Khachina, Executive Director
Esther W. Mbiyu, Projects and Development Coordinator
Joseph Mwangi, MIS Coordinator (FPMD local hire)
Adolph Kapinga, Management Support Unit Consultant (FPMD funded)

Family Planning Association of Kenya (FPAK)

Godwin Mzenge, Executive Director
Margaret Thuo, Program Manager
Maureen Kuyoh, Senior Program Officer (Research and Evaluation)
James Maingi, Program Officer (Training)
Thomas Chuma, Finance Officer (Acting)
Charles Onoka, Research Manager
Mr. Njenga, Personnel/Administrative Officer
Anabel Erulkar, Michigan Fellow (Research and Evaluation)

Diocese of Maseno West (CPK/CSS)

Lucas Wadenya, Director of CCS

Mkomani Clinic Society

F.H. Sherman, Chair

National Council for Population and Development (NCPD)

S. A. Bullut, Director
Kimeli Chipsoror, Deputy Director (Acting)
Paul Kizito, Director, MIS Unit
Alphonse Riaga, Data Clerk/Consultant (FPMD local hire)
Annie Thairu, Head of Programs

Seventh Day Adventist/Rural Health Services (SDA/RHS)

Peter O. Mokaya, Director

Consultants

Kathleen Webb, Managing Director, Brelan Consultants, Ltd.
Amusaa W. Inambao, Management Development Assistance For Health
MacMillan Kiiru, Private Consultant
Joseph Dondo, 3E Consultants

USAID

Gary Leinen, Deputy Director, Population and Health
Millie Howard, Project Officer, Population and Health
Richard Sturgis, Health Policy Advisor (REDSO)

Others

Nelson Keyonzo, Associate Regional Director/Africa, Pathfinder International
Rikka Trangsrud, Program Associate, Family Care International (formerly Michigan Fellow
with FPAK)
Margot Zimmerman, Country Director, PATH

Annex III

Documentation of FPMD/Kenya Achievements 1991-1993

KENYA- Maseno West

I. Institutional Development

Management Review

"A Management Audit and Needs Assessment"

Joseph Dondo and Francesta Farmer, September 1992

Strategic Planning

"Strategic Planning Workshop"

Peter Savosnick, 28 September-1 October, 1993

Personnel Systems

"Community Health Program: Staff Job Descriptions"

Joseph Dondo, May 1993

II. Management Information Systems (MIS)

Development of Information Systems

"Analysis of MIS"-Present status and priorities for development (Includes DRAFT Performance Planning and Review policies and procedures manual- Appendix IV)

Peter Savosnick, October 1992

III. Sustainability

Financing and Cost Recovery

This activity was incorporated into the Strategic Planning exercise (I.B above) by mutual agreement

KENYA-Mkomani Clinic Society

I. Quality of Care Assessment

COPE Assessment

"The Use of Self-Assessment in Improving the Quality of Family Planning"

26

Clinic Operations: The Experience with COPE in Africa" (AVSC Working Paper #2)
Pamela Lynam, et.al., December 1992

II. Management Information Systems (MIS)

Development of MIS

Technical assistance activities in this area is documented in quarterly reports and correspondence between FPMD/Kenya office and the recipient organization.

Computer support

Technical assistance in this area was delayed due to late arrival of Pathfinder-purchased equipment and software. Equipment arrived in January 1994.

III. Personnel Systems

Development of a Personnel System

"Strengthening Personnel Systems and Procedures in Mkomani"
Peter Shipp, December 1991

"Producing Job Descriptions and a Salary Structure for Mkomani Clinic Society"
Peter Shipp, January 1992

IV. Organizational Development

Clarification of Board/Staff Roles and Responsibilities

"Report of a Seminar of Board and Senior Staff Members of Mkomani Clinic Society"
Peter Shipp, August 1992

Staff Training

Victor Were, Bomu Clinic Administrator, attended MSH course "Designing and Developing Management Information Systems"-May/June 1991

Rose Wasunna attended MSH course "Building Management and Leadership for Health Professionals"-March/April 1993

V. Income Generation

Cost Recovery and Sustainability

"Resource Expansion Workshop for Mkomani Clinic Society"

Michael Hall and Deborah Ruhe, August 1993

VI. Quarterly Monitoring Visits

Regular visits undertaken with Pathfinder--documented in quarterly reports to FPMD/Boston

Kenya-National Council for Population and Development (NCPD)

I. Long and Short-term Consultant Support for MIS

This activity was achieved through the FPMD support of two locally hired consultants to NCPD--one Hardware and Training Specialist and one Data Entry Clerk.

II. Provision of Computer Equipment

Computers, software and related equipment have been provided for NCPD during the 1991-93 period of assistance.

III. Workshops and Training

Peter Kibunga, MIS Consultant (now FPMD staff), attended MSH course "Designing and Developing Management Information Systems. May/June, 1991.

"Final Management Information Systems Implementation Seminar" (Held at Silver Springs Hotel, Nairobi)
February 20-21, 1992

Margaret Chemengich, Deputy Director, attended MSH course "MIS Development in Design for Health and Family Planning"-July/August 1992

Monthly reports of MIS Consultant (Peter Kibunga) on file in FPMD/Kenya, including NCPD Staff training schedule contained in June 1993 report.

Training Report, Peter Kibunga, 1993 (list of NCPD and other Government of Kenya staff trained by designation, type of training and dates).

IV. Monitoring and Evaluation (including CAMEO)

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"NCPD Quarterly Monitoring Visit"
Paul Auxila and Peter Savosnick, August 1991.

"Visit to Kenya for Operational Assessment at NCPD"
Jaime Benevente, September 26-October 13, 1992

"Report of the Evaluation of FPMD Technical Assistance to the NCPD"
Dr. A.W. Inambao, (No date).

V. Management Information System (MIS)

[The following documents were developed during the FPMT project, but their use has continued into the current FPMD project]

"System Documentation: Project Database and Activity Monitoring System" (No date)

"Management Information Systems: Project Officer's Handbook"
FPMT/MSH, December 1990.

Kenya-Family Planning Association of Kenya (FPAK)

I. Management Information Systems

"Family Planning Association of Kenya: MIS System Design"
Peter Savosnick, August 1991

Activity Monitoring System
"Draft Trip Report: FPAK"
Peter Savosnick, May 1992

FPAK Project Planning, Monitoring and Evaluation Workshop, Peter Savosnick,
August 1993 (Reported in MIS Quarterly Report, July-September 1993)

II. Financial Planning and Management

Senior Financial Consultant

"Technical Assistance to the Finance and Internal Audit Departments (FPAK)"
Carr Stanyer Gitau & Co, November 1992-January 1993

"Technical Assistance to the Finance and Internal Audit Departments (Phase 2)"
Carr Stanyer Gitau & Co, February-August 1993

"Trip Report: FPAK"
Graeme McDonald, November 23-December 4, 1992

"Internal Audit Manual"
FPAK, August 1993

"Financial Procedures Manual"
FPAK, October 1993

III. Organizational (Institutional) Development

Organizational Structure

"Personnel Management in FPAK: A Revised Organizational Structure and Salary Scale for FPAK" (Final Report)
Peter Shipp, July and October 1991

IV. Strategic and Operational Planning

Completion of Strategic Plan

"Second Workshop on Strategic Planning"
Peter Savosnick, July 1993

Plan approved by FPAK Board of Directors, February 1994

V. Resource Expansion

Cost Recovery

"Resource Expansion Workshop for FPAK"
Michael Hall and Deborah Ruhe, August 1993

VI. Monitoring and Evaluation (Including CAMEO)

"FPAK Workshop on Monitoring and Evaluation"
Peter Savosnick, November 1991

"Visit to Kenya for Implementation of Continuing Assessment Approach for FPAK"
Jaime Benavente, September 26-October 13, 1992

"CAMEO: Continuing Assessment of Management Effectiveness in Organizations"
(Final Technical Report)
Brelan Consultants, September 1993

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VII. Training

Gilbert Magiri, Senior Evaluation Officer, attended MSH course "Designing and Developing Management Information Systems"- May/June 1991

Grace Amurle, Finance Officer, attended MSH course "Financial Management"- June/July 1992

Thomas Chuma, Accounts Officer, attended MSH course "Managing for Sustainability"-April/May 1993

Charles Onoka, Research Manager, attended MSH course "Design and Developing Management Information Systems"-May/June 1993

Kenya-Seventh Day Adventist/Rural Health Services (SDA/RHS)

I. Organizational Development

Management Review

"Analyzing the Organization: The Kenya SDA Rural Health Services"
Joseph Dondo (3E Consultants), December 1991

Strategic Planning

"Strategic Planning Workshops-SDA/RHS"
Francesca Farmer, 21-22 October and 1-4 November, 1992

"Five Year Strategic Plan: 1993-1997"
SDA/RHS. February 1993

II. Management Information Systems

Design of Information Systems

"SDA/RHS MIS Assessment" (Trip report)
Peter Savosnick, May 1992

Other training plans, monthly and quarterly reports document further activity in this area.

III. Financial Systems

Cost Recovery and Financing

"Financial Management Seminar" (Report)
Carr Stanyer Gitau & Co., 20-23 September 1992

"Financial Management for Health Units: Procedures Manual"
SDA/RHS, March 1993.

Kenya-Christian Health Association of Kenya (CHAK)

I. Family Planning Proposal and Project Redesign

Project Redesign and Workshop

"Proposal for a New Project Design: The CHAK Family Health Program",
December 1991

[N.B. This proposal was not accepted by USAID and has, therefore, not been implemented]

II. Management Information Systems

MIS Planning

"MIS Development for the CHAK"
Peter Savosnick, March 1992

"Facility Information System: Reference Manual" (CHAKSTAT), Data Dynamics Ltd., June 1992.

The following activities are documented in routine reports of MIS Consultant to CHAK and/or FPMD MIS Advisor, which are on file in FPMD/Kenya:

MIS Consultant/Coordinator

Computer Equipment Purchase

MIS Monitoring and Supervision

DBase Training

III. Program Planning and Review

Semi-Annual Planning and Review Meeting

"Senior Staff Review and Planning Seminar"
Abigail Krystall, 12-15 November 1991

"Senior Staff Review and Planning Seminar"
Abigail Krystall, 2-3 June 1992

IV. Cost Recovery and Sustainability

Implementation of the "Setting and Assessing Fee Model"

"Setting and Assessing Fee Levels: Preparing Annual Budget" (PCEA Chogoria Hospital-Report and Worksheet Pack)
Carr Stanyer Gitau & Co., October 1992

"Setting and Assessing Fee Levels" (Kijabe Medical Center-Report and Worksheet Pack)
Carr Stanyer Gitau & Co., March 1993

"Setting and Assessing Fee Levels" (Tenwek Medical Center-Report and Worksheet Pack)
Carr Stanyer Gitau & Co., May 1993

"Setting and Assessing Fee Levels: Computer System for CHAK" (Guidelines to the Worksheet Pack and Data Input Pack)
Carr Stanyer Gitau & Co., October 1993

V. Management Support to the CHAK Units

Development of a Management Support Unit (MSU)

"Member Unit Management Support Program: Proposal and Plan of Action"
Adolph Kapinga, March 1993

"Member Units Management Support Program" (3 Volumes)
Adolph Kapinga, October 1993

Letter from CHAK Executive Director commending consultant's work,
January 1994

VI. Monitoring and Evaluation (including CAMEO)

"Visit to Kenya for Implementation of Continuing Assessment Approach for CHAK"
Jaime Benavente, September 26-October 13, 1992

"CHAK-Senior Staff Review Assessment Seminar"
Brelan Consultants Ltd., 16-19 November 1992

"CAMEO: Continuing Assessment of Management Effectiveness in Organizations" (Final Technical Report)
Brelan Consultants, September 1993