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Concept Paper for  
Potential Technical Assistance Activities  
with SECS Using USAID/Romania Field Support Funds

Family Planning Management Development (FPMD)  
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**I. Background**

Proposed Family Planning Management Development Project (FPMD) activities with the Societatea De Educație Contraceptivă Și Sexuală (SECS) will build on sustainability initiatives begun in June 1995, when a comprehensive assessment of clinic operations was carried out by individuals from Management Sciences for Health (MSH) (representing CEDPA), IPPF/Europe Region, and SECS. These initiatives have responded mainly to the need to quickly improve individual SECS clinics' level of financial sustainability, and to date have only just begun to address sustainability at the organizational level.

The objective of the June 1995 assessment was to evaluate clinic performance from financial, managerial, and programmatic perspectives, and to make initial observations to determine prospects for future sustainability. To help clinic staff determine the current level of financial sustainability, identify possible service delivery options, and in turn develop individually tailored strategies for sustaining their clinics, a computerized financial tool was developed during the assessment. At the time of the assessment, according to the available expense and income information, two clinics were operating at more than 90% self-sufficiency, three were operating at between 50% to 90%, and five were operating at between 25% and 50%.

Since the assessment, clinic and Headquarters staff awareness of cost containment and efficiency issues has increased significantly, and most of the clinics have developed innovative strategies to contain costs, stimulate demand, and improve quality. By November 1996, the financial sustainability figures for clinics had increased: one clinic was operating at more than 100%, two were operating between 90% and 100%, five were operating between 50% to 90%, and two were operating at 30% or less.

At the organizational level, SECS has undertaken several management initiatives, including the development of clinic-specific sustainability plans, compilation of a set of *General Measures for Sustainability*, and establishment of committees to address and monitor sustainability measures and clinical activities. While these initiatives demonstrate a commitment to sustainability issues, the initiatives have not been consistently maintained, and the level of achievement has varied between the clinics.

In December 1996, MSH, with input from IPPF/Europe and SECS, designed and conducted a workshop focused on generating practical strategies to stimulate the financial performance of clinics and introducing basic management concepts to improve operating efficiency and performance. Participants included both clinic coordinators and branch volunteers. Significantly, this meeting represented the start of a dialogue between clinic coordinators and branch volunteers, with respect to both clinic operations as well as respective roles and responsibilities.

In March 1997, MSH provided follow up assistance to SECS Headquarters staff and to Management Teams at the ten Branches where clinics exist. The primary purpose of this mission was to facilitate the development of a financial plan for each clinic for the period 1 April - 31 December, 1997 which projected at least 100% financial self-sufficiency. In addition, the consultants assisted Management Teams and SECS Headquarters to think through steps to operationalize the management of clinic operations at the Branch level.

Direct provision of services represents one of the three strategies that SECS has chosen in order to fulfill its mission. The other two strategies are advocacy and institution building. SECS considers advocacy especially critical given the historical view of family planning/reproductive health in Romania, and the current need among decision makers and the general public for greater awareness and information. In the area of institution building, during 1996, SECS developed working groups involving volunteers and staff as part of a revision of the volunteer-staff relationship. Under these three strategies, SECS has been involved in training of family planning providers, family planning clinical services for the public, sex education for young people, development of information, education and communications (IEC) materials, and development of documentation centers for family planning/reproductive health.

In addition to those activities described above, SECS has received technical assistance from IPPF and by other organizations funded by USAID, such as CEDPA and World Learning. Assistance has been provided in the areas of proposal development, marketing, fundraising, volunteer work, training, advocacy and IEC.

## **II. Proposed Activities with SECS**

The proposed MSH/FPMD activities with SECS will use USAID/Bucharest field support funds to build upon the above accomplishments and initiatives, and provide technical assistance in order to strengthen SECS' ability as an organization to fulfill its mission and potential as a leader in Romania's family planning and reproductive health sector; that is, to serve as a resource and partner to the Romanian government; to provide family planning and reproductive health services to Romanian couples; and to act as an advocate on family planning and reproductive health issues. A strengthened SECS will have better access to other donor funds and will be in a position to undertake sustainable growth consistent with its mission. While most of FPMD's technical assistance to date has focused on clinic service delivery, proposed assistance will address SECS' needs more comprehensively, in order to enable SECS to support its strategies of advocacy, institution building, and clinic service delivery.

Specific objectives and technical assistance activities will be identified in full consultation with SECS, IPPF and USAID/Bucharest. Based on needs identified and a prioritization of those needs, a Management Development Plan (MDP) will be developed. The MDP is an FPMD project development tool that in this case will function as a formal agreement between SECS and FPMD. The MDP will contain: an explicit statement of the management development goals and objectives of the technical assistance over time; planned management interventions (activities) that

support the achievement of the goals and objectives; verifiable indicators for measuring progress in achieving the objectives of the MDP; and individuals and organizations who will take lead and secondary responsibility for the various activities. The development of the MDP is itself a technical assistance activity, as it essentially involves designing a workplan for the organizational development of the organization. The MDP is finalized based on the agreement of all parties.

Discussions with USAID/Bucharest have underscored the importance of building on several technical assistance interventions provided to SECS by other organizations in the past as well as current and planned activities (e.g., the CBD study being conducted by Concern International and the establishment of a Resource Center by the Policy project). As part of the MDP development process, MSH/FPMD will conduct an inventory of past accomplishments, ascertain their impact on current SECS operations and then develop MSH/FPMD activities to complement these accomplishments. MSH/FPMD staff will also participate in meetings to be held in Bucharest which will include SECS, IPPF and USAID, and other Romanian and International organizations working in family planning, women's reproductive health and AIDS prevention, including, the Romanian Association Against AIDS (ARAS), Youth for Youth, World Learning and Concern International.

Potential activities in MSH/FPMD's work with SECS fall in four main areas: technical assistance, training, materials development and translation, and information technology.

#### A. Technical Assistance

While the specific objectives and activities will be identified through joint discussion with SECS, the following table presents illustrative areas, based on SECS's current situation and MSH's experience to-date. These areas have been delineated into two categories: Primary areas, which represent those where SECS has not been the recipient of previous assistance in the past, and Secondary areas, representing technical areas where SECS has received some degree of external assistance in the past. A secondary designation does not necessarily reflect a lesser degree of support from MSH/FPMD, but that MSH/FPMD will attempt to build on previous assistance provided.

#### B. Training

Based on identified and mutually agreed upon needs, a variety of in-country and international/regional short-term training activities could be undertaken. Illustrative training activities would include:

##### 1. In-Country Training

- a. Workshops to Disseminate Guidelines (e.g., administrative and financial management, Management Team procedures)
- b. Workshops for Technical Exchange and Enrichment among SECS Branches

- c. Workshops for Volunteer Training (proposed to be the primary responsibility of IPPF, with support from MSH/FPMD)
- d. Workshops for Training in Information Technology

### Illustrative Areas for Technical Assistance

Primary Areas:

	Element	Specific Area
A.	Organizational Structure *	Roles/responsibilities Decentralization/Delegation Job descriptions Staff development
B.	Mission/Strategies **	Validate current mission Review current strategies Prioritize strategies
C.	Financial Management *	Headquarters level Branch (clinic) level
D.	Management Information System *	Headquarters level Branch (clinic) level
E.	Electronic Communications	HQ <==> Clinics Clinics <==> Clinics SECS <==> Rest of the world
F.	Development and Strengthening of Guidelines/Protocols	Clinical/Service procedures * Management Team procedures Administrative procedures
G.	Monitoring and Evaluation	Performance Indicators Periodic review Supervisor/self assessment
H.	Volunteers **	Roles and responsibilities Creating an effective volunteer network
I.	Integrating SECS' Activities with the Government Program	Roles and responsibilities Creating an effective partnership

Secondary Areas:

	Element	Specific Area
J.	Institutional Sustainability *	Proposal development Marketing of services Fundraising
K.	Curriculum Development and Training of Trainers	Topics to be selected (in support of possible grant from UNFPA/UNICEF for training in Women's Demonstration Project)
L.	Information, Education, and Communications	Management of innovative, cost-effective strategies in relation to SECS' advocacy and other roles, management of activities

\* Proposed to be implemented in conjunction with IPPF.

\*\* Proposed to be the primary responsibility of IPPF, with support from MSH/FPMD.

2. International Training

- a. Study tours to the US, other countries in Europe and elsewhere by SECS HQ staff, Clinic Managers and selected Branch Volunteers to observe successful family planning non-governmental organizations (NGOs).

All training activities would be designed to contribute to specific aspects of SECS's management development, and would include advance identification of follow-up activities in which learning and experience gained through the training would be used back on the job.

C. Materials Development/Translation

FPMD and other technical materials translated into Romanian could also provide important guidance and resources to SECS staff, who may not previously have had access to international management materials. For maximum impact, these materials would also be incorporated into or linked with training activities. The following are some illustrative materials that might be translated and made available to SECS staff and volunteers.

The USAID-funded Policy project has begun the development of a resource library for family planning materials relevant to Romania. MSH/FPMD will coordinate any activities in this area with Policy project initiatives.

1. FPMD Materials
  - a. *The Family Planning Manager's Handbook: Basic Skills and Tools for Managing Family Planning Programs* (selected chapters)
  - b. *Management Strategies for Improving Family Planning Services: The Family Planning Manager Compendium* (selected chapters)
2. Non-FPMD (Phare, UNFPA, Soros, other) Materials
  - a. British and other European Family Planning journals
  - b. Other technical journals

One objective of the proposal development area (under institutional sustainability) could be for SECS to find funding for translation of relevant materials.

#### D. Information Technology

The upgrading of SECS' capacity in information technology would support essential program and financial management and communication functions. In addition, strengthened information technology capacity would allow SECS to gain access to information available outside of Romania, including materials on tools and approaches being developed and compiled by FPMD task forces, and for SECS staff to establish linkages with family planning/reproductive health professionals elsewhere. Upgrading of capacity would include hardware and software, as well as the necessary related human resource skills. As part of the initial planning, a comprehensive hardware, software, and skills inventory of SECS Headquarters, Clinics, and Branches would be carried out, and relevant recommendations included in the MDP. If necessary, possible funding sources would be identified for obtaining necessary hardware and software, and proposals developed for donors.

### **III. Other Potential Activities**

While most of the discussions between MSH/FPMD and USAID have focused on potential activities associated with SECS, MSH/FPMD is prepared to work on other USAID-funded initiatives in family planning in Romania which may benefit from management development expertise available through the FPMD project. These may include working with the Government of Romania and SECS to pilot the implementation of an integrated women's reproductive health program in two *judets*, as a continuation of USAID's previous work on decentralization; providing technical assistance in management development to Youth for Youth and/or other NGOs; and facilitating the development of a Strategic Plan for the National or *judet* level family planning programs. This concept paper has not specified any of the proposed activities related to these other initiatives, since detailed discussions or agreement by stakeholders have not been completed. The final level and mix of activities will be contingent on available field support funding.

Additionally, USAID anticipates an increase in resources devoted to child welfare activities in Romania during the coming year, with an overall objective toward reducing the number of institutionalized children. MSH/FPMD will coordinate with USAID and other organizations to complement and enhance promotion of child welfare activities when possible.