

**SITE SUPERVISION GUIDE
FOR
CEPEP CLINICS**

Stacey Irwin Downey
Sarah Johnson
Erin Mone

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INTRODUCTION

Management Sciences for Health uses the Fully Functional Service Delivery Point (FFSDP) concept to identify the basic characteristics needed by clinics and health centers to deliver quality primary health care services to the local population and also to ensure effective interaction between provider and staff. A Fully Functional Service Delivery Point (FFSDP) is, “a fully functional service delivery point is a service site where trained staff, adequate supplies, and suitable facilities are present simultaneously for the delivery of a basic package of services to meet the client needs (FPMD Technical Notes , November 1996).” These characteristics include:

- “Trained and committed staff who are competent to provide the basic services package appropriate to a facility at that level;
- Adequate supplies, contraceptives, drugs and equipment required for the service package;
- A functional facility for contraceptive distribution and counseling and for the delivery of other reproductive health interventions (e.g. availability of water, electricity or other source of energy, private examination and counseling rooms and adequate storage facilities);
- An adequate referral network including communications and transportation to connect the Service Delivery Point to backup facilities when there is a need for more sophisticated advice or interventions are needed;
- Adequate information about clients and about available resources to enable staff to respond to client needs and help clients make informed choices about their reproductive health”(FPMD Technical Notes, November 1996).

This tool is designed to assist supervisors assess the management and quality of services being provided by CEPEP’s clinics throughout Paraguay including the broad areas of management, clinic services and staff development. This tool is best used on a bi-annual (twice a year) basis and can be completed in a day long site visit. The tool, designed to promote team-work and interaction with staff, is divided into four component areas:

- management audit
- clinic observation and/or field observation
- team meeting
- summary planning

Four Components of the Site Visit Supervision Guide and a Sample Schedule

9:00-9:30am	Supervisor arrives, greetings
9:30-11:00am	MANAGEMENT AUDIT: A meeting between the supervisor and the health center/clinic director focusing on reporting and MIS, quality of care, financial management, human resource development, current problems/issues, etc.
11:00-12:30pm	CLINIC OBSERVATION: A clinic walk-through and an observation of a client visit. Once a year Supervisors should also make a visit to the field to observe, firsthand, community health worker activities, an activity promoting the clinic, or a health prevention and education campaign, in addition to the clinic observation.
12:30-2:00pm	TEAM MEETING/LUNCH: A meeting of the supervisor with the clinic staff to promote teamwork and local problem solving (e.g. discussions of current issues, in service training, etc.)
2:00-3:30pm	SITE VISIT SUMMARY: Supervisor and health center/clinic director summarize the day long meeting, strategize on problem resolution and establish goals for the next designated time period, e.g. 3 months

NOTE: Activities such as those mentioned in the ‘clinic observation’ should be carried out at least once a year.

SITE VISIT SUPERVISION GUIDE

Clinic: _____
Supervisor: _____
Clinic Director: _____
Date of Visit: _____

1) MANAGEMENT AUDIT

Purpose: The management audit is conducted with the health center/clinic director to assess the overall quality and management of services being provided. The meeting begins with open ended questions and a review of previously established goals, followed by a review of critical management operations. If this is your visit, review the status of services and management in general and establish goals for the next designated time period.

Supervisor will ask the following questions:

1. What were the most successful aspects of the clinic's/program's activities in the last six months?
2. What challenges were encountered in the last six month period ?
3. What has been done to correct these challenges?
4. What challenges currently exist?
5. Other issues/challenges/problems? (e.g. personnel problems, supplies, logistic issues, etc.)

SUMMARY:

1) MANAGEMENT AUDIT	
Review the following with the Clinic Manager	Comments/Recommendations
<p>A. Progress on annual or quarterly work plan:</p> <ul style="list-style-type: none"> • Work plans jointly developed and up-to-date (e.g. activities planned, progress towards meeting goals, etc.) 	
<p>B. Organizational Structure</p> <ul style="list-style-type: none"> • Organigram (organizational chart) up-to-date • Levels of authority clear • Staff meetings held on a regular basis 	
<p>C. Reporting and MIS</p> <ul style="list-style-type: none"> • Reporting of information is regular, and shared among units • Staff fill out forms correctly and submit on time • Data analysis accessible to staff (completed locally) • Monthly reports sent from Asunción • Records are kept and updated for each client 	
<p>D. Financial Management</p> <ul style="list-style-type: none"> • Accounting registers, journals and ledgers up-to-date and accurate • Financial and client data reports submitted in a timely manner • Financial activities ensure that more than one person reviews transactions • Cash flow projected annually and monitored to prevent shortages • Monitoring of petty cash system 	
<p>E. Human Resource Management</p> <ul style="list-style-type: none"> • Lines of supervision clear? Problems? • Staff training and development plan current and linked to performance objectives? • Clinic manager conducts routine supervision? • Performance Planning and Review system used? • All staff have current job descriptions with duties clearly defined? • Clinic staff receive Continuing Medical Education? • Imminent staff changes (staff leaving, maternity leave, new hires)? 	
<p>F. Supplies/Equipment/Clinic Infrastructure</p> <ul style="list-style-type: none"> • Adequate space and equipment exists to support activities? • Equipment in good working order? • Problems with acquiring necessary supplies? 	

2. CLINIC OBSERVATION

Purpose: The purpose of this section is to observe the management and quality of service delivery through an observation of a client visit as well as a clinic walk-through. Supervisors from the Central Office can also perform clinic medical record review once a year.

2) CLINIC OBSERVATION	
	Comments/recommendations
<p>A. Observation of client provider interaction (minimum of two observations)</p> <ul style="list-style-type: none"> • Provider politely welcomes client and introduces her/himself • Provider guarantees confidentiality • Clear and complete information is provided to client <ul style="list-style-type: none"> - how it works - how to use it - side effects - warning signs - management of side effects (if they occur) and warning signs - follow-up and re-supply • Appropriate attitude, tone of voice, and language is used • Client has choice of Family Planning methods available at the clinic • Visit is private and confidential • All materials are signed and dated by both the provider and client (if necessary) • IEC materials are available, visible, used properly and are up to date • Provider followed all proper clinical procedures • Provider encouraged client to return 	
<p>B. Observation of clinic</p> <ul style="list-style-type: none"> • Infection prevention procedures are adequate and followed • Continuous supplies are available for the client • Outside entrance, patient waiting room, exam room, bathrooms are clean (e.g. no dust or spider webs), well lit and ventilate. • Rational drug use being followed • Written guidelines for Family Planning education and practice are 	

<p>Visible</p> <ul style="list-style-type: none"> • Sufficient space to provide sufficient privacy for clients during visit • Debris (e.g. syringes, wrappings, gloves, etc.) is discarded appropriately • Instruments are properly sterilized • Names of providers posted in waiting room area • Clients rights posted • Prices posted in clear view for clients to see • Clients records are up to date and complete 	
<p>C. Family Planning Methods</p> <ul style="list-style-type: none"> • A variety of family planning methods are available • Family planning stock levels are adequate, up to date and working to deliver safe services • Clients are referred for methods not available in clinic 	
<p>D. Stock levels are adequate for other primary health care drugs and materials:</p> <ul style="list-style-type: none"> • Oral rehydration salts • Antibiotics • Etc. 	
<p>E. Commodity procedures:</p> <ul style="list-style-type: none"> • Register reflects current inventory • Proper and secure storage is used • Stock rotation is routinely practiced • Monitoring system is in place to prevent stock outs 	

Summary

3. TEAM MEETING

Purpose: The purpose of the team meeting is to promote teamwork, local problem solving and in-service training. The agenda of the meeting is jointly set by the Director and staff and all staff should participate. As supervisor, use this time to provide information updates from the central office, ask targeted questions and encourage problem solving capacity of the local team.

Issues for Supervisors to keep in mind:

- Is the agenda appropriate (e.g. the content clearly explained, the appropriate number of items, a time designated for staff to express concerns and address work related items) ?
- Are the Director and staff prepared for the meeting?
- Do most of the staff participate?
- Is there a willingness on the part of the staff to address issues?
- Is communication encouraged and listened to?

Summary of Team Meeting and Recommendations

4 SUMMARY OF SITE VISIT

Purpose: The purpose of the summary is to discuss findings with the Clinic/Program Director and jointly agree on goals and activities for the next designated time period

Identified Challenges	Recommendations for Solution	Follow-up actions and Person Responsible	By when

The following signatures must be supplied at the close of the meeting to assure all parties involved are following the procedures for follow-up regarding the supervision meeting.

Central Office Supervisor

Date

Clinic Supervisor

Date