

PNAAN 902

**MANAGEMENT ANALYSIS TRAINING
MODULE**

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The MEDEX Primary Health Care Series

**MANAGEMENT
ANALYSIS TRAINING
MODULE**

Student Text

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Health Manpower Development Staff
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TASK ANALYSIS TABLE

Planning, conducting, and reporting on analytical studies of primary health care management support systems

Work Requirements <i>DUTIES</i>	Training Requirements	
	<i>SKILLS</i>	<i>KNOWLEDGE</i>
<p>The management analyst will:</p> <ol style="list-style-type: none"> 1. Introduce others to management development 2. Gather information for a management analysis study 	<p>The management analyst trainee will demonstrate his ability to:</p> <ol style="list-style-type: none"> 1.1 Explain management analysis and the management systems improvement process 2.1 Select representative information sources 2.2 Arrange appointments and visits 2.3 Screen records 2.4 Conduct inspections 2.5 Conduct interviews 	<p>The management analyst trainee will demonstrate his knowledge of:</p> <ol style="list-style-type: none"> 1.1.1 The concept and objectives of management analysis and the management systems improvement process 2.1.1 Information sources 2.1.2 Criteria for determining representative information sources 2.2.1 Institutional rules and procedures 2.2.2 Transportation and communications 2.3.1 Methods of screening records 2.4.1 Methods of conducting inspections 2.5.1 Interviewing methods

Work Requirements DUTIES	Training Requirements	
	SKILLS	KNOWLEDGE
3. Summarize and analyze information for a management analysis study	2.6 Adapt and use a management system workbook	2.6.1 Adaptation guidelines 2.6.2 Concepts and contents of the management system workbooks
4. Prepare and present a report of a management analysis study	3.1 Summarize findings and formulate conclusions	3.1.1 Criteria for determining the relevance, validity, and reliability of data 3.1.2 Methods of organizing data for analysis
	3.2 Identify and select alternative recommendations	3.2.1 Sources of innovative ideas 3.2.2 Methods of creating and adapting innovative ideas
	4.1 Write a report of study findings, conclusions, and recommendations	4.1.1 The format and content of a written report 4.1.2 How to write clearly and simply
	4.2 Prepare and present an oral report with or without visual aids	4.2.1 The format and content of an oral report 4.2.2 How to prepare and use visual aids

SCHEDULE
MANAGEMENT ANALYSIS TRAINING MODULE

DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
<p>Pretest</p> <p>Explaining management analysis and the management systems improvement process</p>	<p>Adapting a prototype management system workbook</p>	<p>Identifying and reviewing written documents for a management analysis study</p>	<p>Gathering information through observation</p>	<p>Gathering information through interviews</p>
<p>Adapting a prototype management system workbook</p>	<p>Identifying and reviewing written documents for a management analysis study</p>	<p>Gathering information through observation</p>	<p>Gathering information through interviews</p>	<p>Conducting a work flow analysis</p>

DAY 6	DAY 7	DAY 8	DAY 9	DAY 10
Conducting a work flow analysis	Conducting a work flow analysis	Summarizing and analyzing information for a management analysis study	Summarizing and analyzing information for a management analysis study	Preparing a written report of a management analysis study
Conducting a work flow analysis	Summarizing and analyzing information for a management analysis study	Summarizing and analyzing information for a management analysis study	Preparing a written report of a management analysis study	Preparing and presenting an oral report of a management analysis study

DAY 11	DAY 12			
Preparing and presenting an oral report of a management analysis study	Preparing and presenting an oral report of a management analysis study			
Preparing and presenting an oral report of a management analysis study	Posttest			

Introduction

This module will help you develop the necessary skills, knowledge, and attitudes to strengthen management support systems for primary health care. This module will guide you through a complete study of a management support system using a management system workbook. The module and the workbook will help you learn to gather information for a study of a management support system; develop and analyze study findings, conclusions, and recommendations; and prepare written and oral reports of the study.

LEARNING ACTIVITIES

Activities in this module will help you learn to conduct a management analysis study. Your schedule shows you when the learning activities will occur. Student Guides in front of each unit tell you more about what you will be expected to do. The units will be taught in order, from Unit 1 to Unit 5.

EVALUATION

You will be evaluated on your performance as you proceed through this training module and after completing your first study of a management support system.

A pretest will evaluate your knowledge before you begin your training. The pretest will provide you and your instructor with information on your strengths and weaknesses to help in planning your training. Next, your knowledge and skills will be evaluated by the instructor as you participate in various training exercises. Then, a posttest will evaluate your knowledge at the conclusion of the module. Finally, your performance as a management analyst will be evaluated on the basis of the actual reports you prepare and present from your first management analysis study.

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Unit 1

Management Analysis and the Management Systems Improvement Process

STUDENT GUIDE

OBJECTIVES

1. Explain management analysis and the management systems improvement process.
2. Adapt a prototype management system workbook to reflect local language and usage.
3. Select a representative sample of people to be interviewed for a management analysis study.
4. Determine the type and number of forms needed to carry out a management analysis study.

LEARNING ACTIVITIES

1. Read Unit 1 in the Student Text and answer the review questions.
2. Take part in a class discussion of the review questions.
3. Take part in a role-play exercise to explain the management analysis approach.
4. Take part in an exercise on adapting a prototype management system workbook to reflect local language and usage.
5. Take part in an exercise on selecting representative samples of people to be interviewed for a management analysis study.
6. Take part in an exercise on calculating the correct number of forms needed to carry out a management analysis study.

1.1 MANAGEMENT DEVELOPMENT

People throughout the world are working to achieve the international goal of health for all by the year 2000. One of the greatest obstacles to achieving this goal is the lack of management skills and expertise. The provision of primary health care services depends on the development of management skills and expertise, or what is commonly known as management development.

Management development is a long-range, step-by-step process for improving an organization's management performance. Management development affects all levels of an organization. Management development is concerned with training workers to improve their management skills and improving the management systems within which they work. This module is concerned mainly with the second area: improving the management systems within which people work. This improvement is directed at both the broad problems of resource allocation, policy making, and organizational structure and the more specific aspects of running the system, such as procedures, forms, and day-to-day operations.

1.2 MANAGEMENT SUPPORT SYSTEMS

Management systems provide essential support for primary health care workers. Management systems are also used to control and protect valuable resources. Everyone in the organization is affected by, and can also influence, how management systems work. The eight basic management systems needed to support primary health care services are:

Drugs and Medical Supplies

This system is used to procure, store, distribute, and control the use of drugs and medical supplies.

General Supplies

This system is used to procure, store, distribute, and control the use of administrative, office, and other supplies and equipment.

Facilities and Equipment Maintenance

This system is used to protect facilities and equipment from deterioration and to help prolong their useful life through regular preventive maintenance and repair.

Transportation

This system is used to provide, protect, and manage transportation resources needed to move health workers, patients, and supplies.

Communication

This system is used to provide, protect, and manage communication resources that link health workers to each other, to their supervisors, and to patient referral centers.

Personnel

This system is used to plan, recruit, employ, supervise, and evaluate health manpower.

Finance

This system is used to plan, obtain, control, and use financial resources.

Health Information

This system is used to gather, organize, report, and use data for planning and managing health care services.

A problem in any one of these management support systems can hinder the delivery of primary health care services.

1.3 IMPROVING MANAGEMENT SYSTEMS

A management system involves many people at all levels of an organization. A change in one part of a management system usually affects the other parts. To improve a system is a complicated task. But it need not be difficult. The experiences of the past have shown that improving the performance of a system must be done in a step-by-step process. There are five steps to improving a system: preparation, management analysis, decision-making, implementation, and evaluation and systems renewal. The five steps make up the management systems improvement process.

Preparation

High level government officials authorize a process to improve one or more management systems. They inform all persons working in or affected by the system of why the study is being done, who will do it, and how it will be done. The officials who are responsible for the system under study should take part in initiating the process.

Government officials then select and train a management analyst in basic management analysis skills and methods. They orient other officials and personnel who are involved, either directly or indirectly, in the system to be studied.

Management Analysis

A trained management analyst such as yourself carries out a thorough study of the management system or systems. He prepares a first draft of a study report. He circulates the report for review and comment by officials and other workers who are involved in the system to be studied. He then prepares a final written report that incorporates comments received on the draft. He also prepares an oral presentation of the report.

Decision-Making

Specially selected government officials plan and conduct a workshop or series of workshops to review and validate the study report and recommend actions to be taken. People with responsibility for or influence over the way the system being studied is managed take part. This will help motivate them to carry out the changes recommended in the workshop.

Members of the workshop planning team prepare a workshop report. The management analyst usually takes part in this effort. A policy committee at the national level reviews the workshop recommendations and decides on changes to be recommended. The policy committee prepares formal written requests and related justification statements needed to obtain official approval for system changes. The management analyst often takes part in this effort. The ministry of health or other central government agencies approve changes in the system.

Implementation

The central authority issues directives for change to officials at all levels of the system. This may involve revising existing policies, procedures, forms, and expected standards of performance. Officials in the field implement improvements in the system, with help from the central ministry of health staff and the management analyst.

They revise training materials for personnel affected by changes in the system. They also prepare and conduct orientation sessions for all personnel affected by changes in the system.

Evaluation and Systems Renewal

Field personnel and the central staff evaluate the system and assess the impact of changes. They periodically repeat any or all of the steps described above to ensure an acceptable level of performance for the system.

1.4 THE MANAGEMENT ANALYSIS PROCESS

You are at the management analysis stage of the process. Management analysis is the study of the causes of and alternative solutions to management problems. You analyze a management support system within the broader framework of the health care system, taking into consideration how resources are allocated to effectively and efficiently meet priority needs. Within this broader framework, you identify problems, isolate their causes, and develop alternative solutions. Your job as a management analyst is to break down large management problems into their component parts using a step-by-step process. In this way, you can systematically understand and solve these large problems.

As a management analyst, you:

- Identify the management support system to be studied and review background information

- Develop a plan for conducting a study of the management support system

- Gather information about the management support system

- Summarize and analyze the information that you gathered

- Identify possible solutions to the problems that you have identified

- Describe your findings, conclusions, and recommendations in a written report

- Present an oral report of your findings, conclusions, and recommendations

- Help implement approved changes in the system

These steps are described in Units 2 through 5.

1.5 MANAGEMENT SYSTEM WORKBOOKS

Management system workbooks will guide you in the management analysis process. A management system workbook provides guidelines for planning and conducting a study of a management support system. A workbook is available for each of these management support systems:

- Drugs and medical supplies
- General supplies
- Facilities and equipment maintenance
- Transportation
- Communication
- Personnel
- Finance
- Health information

1.6 ADAPTING A PROTOTYPE MANAGEMENT SYSTEM WORKBOOK

By this time, you should know which management system you are to study. You have a copy of the workbook for that system. Since management procedures vary for each country's health system, the workbooks fit no one situation perfectly. Although they are based on field experiences in a variety of countries, the workbooks are prototypes that are designed to be adapted. Before you begin using a workbook, you must revise it to satisfy the special conditions in your country or region. First, read the workbook carefully. A thorough review of the workbook will give you an overall understanding of its contents. Then, do the following:

- Change the language to reflect local usage
- Revise the forms in the workbook as needed
- Add additional copies of revised forms as needed to carry out a management analysis study

Changing Language to Reflect Local Usage

The prototype management system workbooks are written in American style English. You may have to adapt the language of your workbook to reflect usage in your country. Exercise 2 will explain this procedure.

Revising Workbook Forms

The workbooks are organized in sequential order so that the user can proceed step-by-step and page-by-page. The workbooks consist mainly of forms. The forms help to identify subject areas that need to be examined and to collect information in an organized, standardized way so that it can be systematically summarized and analyzed. You may have to revise the content of the forms to reflect the situation in your area.

Adding Workbook Forms as Necessary

Each prototype workbook contains only one copy of each form. You will need to add additional copies of forms to cover all persons to be interviewed and all facilities to be surveyed.

To determine the number of forms that you will need to carry out your first system study, you must decide on the number of people to be interviewed. You do not have enough time to interview everyone involved. Therefore, you must select a sample of people to interview. You should select a representative sample rather than a random sample. In a random sample, each element has an equal probability of occurring. In a representative sample, each element represents different, often diverse characteristics. A representative sample of people to interview will give you a broad cross-section of the information you need to complete your study. You will learn to select a representative sample and to calculate the number of workbook forms that you will need in Exercises 3 and 4. You will record the list of persons that you interview or plan to interview on Form 1 in the management system workbook.

REVIEW QUESTIONS
**Management Analysis and the Management
Systems Improvement Process**

1. What is management development?
2. List the eight basic management systems needed to support primary health care services.
3. Management analysis is a new concept to many people. You have been asked to explain it to a group of health officials. What would you tell them?
4. You have been assigned to study a health program's communication system. What steps would you take to accomplish this task?
5. Describe in the correct sequence the five steps in the management systems improvement process. Indicate in which steps, you, as a management analyst, will be directly involved.
6. What is the purpose of a management system workbook?
7. What is the difference between random and representative sampling?
8. TRUE (T) or FALSE (F)
_____ A management system workbook provides a systematic approach for planning and conducting a management analysis study.
_____ The prototype workbooks are complete and require no adaptation.

EXERCISE 1

Explaining Management Analysis and the Management Systems Improvement Process

SITUATION

You have been invited to attend a meeting that has been called by the district health officer to discuss problems with the drugs and medical supplies system at the district level. The chief pharmacist has also been invited to attend. The chief pharmacist is responsible for drugs and medical supplies in the ministry of health. You have been selected to conduct a management study of the drugs and medical supplies system. This is your first management analysis study.

Dr. Brown is the district health officer. He has had problems with the drugs and medical supplies system for years. In fact, he is so frustrated that he has given up trying to get the ministry of health to improve the system. He called this meeting at the insistence of his chief nurse. Dr. Brown believes the only solution to the problem is to install a privately funded and operated pharmacy. He has been seeking funds to do this, but without success.

Some of the common drugs and medical supplies problems in this district are:

- Responses to drug requests from the district are always delayed

- Key drugs are continuously out of stock

- Expired drugs are continuously sent to the district

- Drugs shipped in bulk to the district have to be repackaged before they can be dispensed

- Drugs are labeled in languages not understood by district health personnel

- Drugs are lost during shipment from the central warehouse to the district

Another major problem is the breakdown of the cold chain caused by refrigerators that are poorly maintained and inadequately supplied with fuel. This results in the spoilage of drugs and vaccines. In several cases, ineffective vaccines ruined by unreported breakdowns in the cold chain were given to a large number of children. Dr. Brown was extremely upset and angry when he found out about this.

Dr. Brown opens the meeting. He says, "Well, here we are again,

with continuing drug and medical supply problems and little change since the last time we met two years ago. Perhaps the chief pharmacist has an explanation as to why nothing has improved in the last several years?"

The chief pharmacist replies, "Yes, unfortunately we haven't been able to do too much about the drug and medical supply problems. However, I am pleased to report that we finally have central government approval to take some action. Perhaps Mr. Wright, the person assigned to help us, would care to comment?"

YOUR ASSIGNMENT

In this role-play exercise, you will have the opportunity to play Mr. Wright. You will give a presentation, while other students play the following roles:

Dr. Brown, the district health officer

Mrs. Green, the chief nurse of the district

Mr. Yellow, the chief pharmacist of the ministry of health

Mr. Blue, the district pharmacist (Optional)

Observer

You have been trained as a management analyst. Your assignment is to study the drugs and medical supplies system in the country and to recommend how it can be improved. You are in a meeting in the district where you are going to begin your study. You must explain to these people the method you are going to use and how this management study will help to improve the drugs and medical supplies system. You will have ten minutes to make your presentation followed by whatever general discussion the senior official, Dr. Brown, allows. Follow these steps to prepare for and perform your role.

STEP 1

Prepare for the meeting. Before the meeting you should try to anticipate the questions and issues that may arise, and think about how you will answer them.

STEP 2

Take part in the meeting. You are not the senior official at the meeting. Therefore, you must wait until you are asked to make your presentation. Then, you may begin your presentation. After your presentation, ask for questions and comments.

STEP 3

During the role-play, the person assigned to be the observer will

complete the **Worksheet for Exercise 1**. After the role-play, he will lead a discussion about your performance as **Mr. Wright**.

STEP 4

The class will repeat the role-play as many times as necessary to allow each member of the group to play **Mr. Wright** and the observer.

STEP 5

Take part in a general class discussion about the exercise.

WORKSHEET FOR EXERCISE 1
Explaining Management Analysis
and the Management Systems Improvement Process

Rate the performance of the student playing the role of Mr. Wright.
Circle the appropriate number for each question below. Number 1 is the
lowest rating. Number 5 is the highest.

1. Did Mr. Wright show proper respect to the official in charge? _____
1 2 3 4 5

2. Did Mr. Wright accurately describe the management analysis process? _____
1 2 3 4 5

3. Was the presentation informative? _____
1 2 3 4 5

4. Was the presentation convincing? _____
1 2 3 4 5

5. Did the presentation arouse the interest of the participants? _____
1 2 3 4 5

6. Did Mr. Wright end the presentation on time? _____
1 2 3 4 5

7. Did he end it appropriately? _____
1 2 3 4 5

8. Did Mr. Wright handle questions well? _____
1 2 3 4 5

9. Did Mr. Wright earn the cooperation of the participants? _____
1 2 3 4 5

10. Did the participants enjoy the role-play? _____
1 2 3 4 5

11. Comment on any special strengths you noticed in Mr. Wright's performance. _____

12. Comment on any special weaknesses in Mr. Wright's performance. _____

EXERCISE 2

Adapting a Management System Workbook to Reflect Local Language and Usage

SITUATION

The prototype management system workbooks are written in American style English. This exercise gives you an opportunity to adapt the language of your workbook to reflect usage in your country.

YOUR ASSIGNMENT

STEP 1

Read your management system workbook and review it page-by-page.

STEP 2

Record on the Worksheet for Exercise 2 the words or phrases that you think need to be changed. Note the page number on which each word or phrase appears. Then record the new words or phrases that you propose using.

STEP 3

Take part in a class discussion to review and reach agreement on language changes proposed by the class.

STEP 4

Write the agreed upon language changes in your workbook.

STEP 5

Give your adapted workbook and your worksheet to your instructor for review and evaluation.

**WORKSHEET FOR
EXERCISE 2
Adapting a Management System Workbook
to Reflect Local Language and Usage**

Record below the words or phrases in your workbook that need to be changed to reflect local usage. Also record the new words or phrases that you propose using.

Page	CHANGE FROM	CHANGE TO

EXERCISE 3

Selecting a Representative Sample of People to Be Interviewed for a Management Analysis Study

SITUATION

One of the most effective ways to obtain information is through personal interviews. However, you will usually not have enough time to interview everyone involved with the management system you are studying. Therefore, you will need to select a representative sample of people who will be able to give you the broad cross-section of information you need to complete your study. This exercise gives you an opportunity to practice this technique.

YOUR ASSIGNMENT

STEP 1

Your instructor will give you a list of all rural health posts and health centers, all district, regional, and central health officials, and all other offices and officials who are directly or indirectly related to the system you are studying. Review this list.

STEP 2

Select a representative sample from the list. Record your selections on the Worksheet for Exercise 3.

STEP 3

Exchange worksheets with another student. Take part in a class discussion of the representative sampling approach.

STEP 4

Return the other student's worksheet. On a new worksheet, record a second representative sample selected from the same list of health posts and health officials.

STEP 5

Give this worksheet to the instructor for review and evaluation.

STEP 6

The instructor will return the worksheet to you. Record the corrected list on Form 1 of your management system workbook, List of Persons Interviewed. This completed form will guide you in the activities for Exercise 4.

WORKSHEET FOR EXERCISE 3
Selecting a Representative Sample of People to Be
Interviewed for a Management Analysis Study

Select a representative sample of people to be interviewed from the list compiled by your instructor. Record your selections in each category below.

HEALTH POST AND HEALTH CENTER LEVEL	DISTRICT LEVEL	REGIONAL LEVEL	CENTRAL LEVEL

EXERCISE 4

Selecting the Forms Needed to Carry Out a Management Analysis Study

SITUATION

In the previous exercise you selected a representative sample of people to interview for your study. You must now determine the type and number of forms that you need to complete your study. You will insert the forms into your management system workbook before you actually begin your study.

YOUR ASSIGNMENT

STEP 1

Review your management system workbook. Read the instructions for the use of each form. Identify the forms that you plan to use in your study. Refer to the Ordering List for Workbook Forms at the beginning of your workbook.

STEP 2

Based on the information in Form 1, List of Persons Interviewed, and the instructions for the use of each form, calculate the number of additional forms you will need for your study. Write the number of each form needed on the Ordering List for Workbook Forms.

STEP 3

Give the Ordering List for Workbook Forms to your instructor. He will obtain the number of forms you need.

STEP 4

Count your forms to make sure you have received the correct number. Insert the forms into your workbook in the appropriate places.

Unit 2

Gathering Information for a Management Analysis Study

STUDENT GUIDE

OBJECTIVES

1. Obtain and review records, reports, and other documents for a management analysis study.
2. Gather information through observation.
3. Gather information through interviews.
4. Conduct a work flow analysis.

LEARNING ACTIVITIES

1. Read Unit 2 in the Student Text and answer the review questions.
2. Take part in a class discussion of the review questions.
3. Take part in an exercise to identify written documents for a management analysis study.
4. Take part in an exercise to review written documents for a management analysis study.
5. Take part in an exercise to gather information through informal observation.
6. Take part in an exercise to gather information through formal observation.
7. Take part in a role-play exercise to gather information through a personal interview.
8. Take part in a role-play exercise on using a workbook form in an interview.
9. Take part in an exercise on conducting a work flow analysis of a case history situation.
10. Take part in an exercise on conducting a work flow analysis of an existing situation.

2.1 INFORMATION SOURCES

You begin your management analysis study by gathering information. Gathering information is the management analyst's most time-consuming activity. It is also one of the most important. The entire management systems improvement process depends on the quality of the information you gather. You will use three basic sources of information in your work as a manager + analyst:

- The memories and insights of other people
- Records, reports, and other written documents
- Direct observation of events and conditions

The Memories and Insights of Other People

Other people's memories and insights can be your most important source of information. People with valuable information are located both within and outside of the system you are studying. You must identify these people so that you can arrange to interview them. Ideally, you should interview everyone who is involved directly or indirectly with the system being studied. But interviewing everyone takes up too much time and energy and results in an overload of similar information. Therefore, you must be selective about which people you interview. You should interview people from different organizational levels and geographical locations and with different points of view. This is called a representative sampling approach. You learned about the representative sampling approach in Unit 1. Interviewing procedures are discussed in section 2.2.

Records, Reports, and Other Written Documents

Usually a surprising amount of information is already written down about a management support system. Survey the background and other written information available in ministry of health libraries, central files, and archives. Gather and review official policy and procedure manuals, official directives, publications, files, statistical data, monthly and annual reports, and other written materials.

People in charge of the system will usually be able to provide a list of important documents, such as previous study reports, monthly and annual reports, and papers from past conferences and workshops. They can also tell you where these documents are

located. Some governments have central libraries with a section for health services. Some ministries of health have their own libraries. Also ask permission to review the files and bookshelves of government officials. Review the materials before conducting formal interviews with these officials. Your familiarity with the background information will likely improve the interviews.

Keep a written list of all the records and reports that you review. Do this as you go along, rather than waiting to the end when you are writing your report. Exercise 5 will give you an opportunity to identify sources of information about the management system you are studying. You will use Form 2 in your management system workbook to record the list of documents that you review for your study. This list will serve as the bibliography for your written study report.

Direct Observation of Events and Conditions

Direct observation gives you information about people, events, and conditions in the organization that you are studying. You can obtain much valuable information if you simply look around and observe. For example, you can learn about the:

- Physical layout and appearance of a work place
- Environmental conditions in a work place, such as noise, light, temperature, and ventilation, that affect workers
- Operating condition of equipment
- Pace and nature of people's work
- Sequence and flow of activities
- Procedures for recording, filing, and retrieving information
- Dress, behavior, and interpersonal relations of workers
- Outwardly expressed attitudes of patients, workers, and supervisors

You gather information through direct observation either informally or formally.

a. Informal observation

You can gather information by informal observation at these times:

- As you sit and wait for a scheduled interview to begin
- During an interview, when the person being interviewed is interrupted by a telephone call or other business
- When you are escorted through a facility or on your way to another interview

You cannot write down information gathered through casual

observation immediately. You must record it later. You can enhance your memory by systematically going over in your mind all the things that happened during the period you are trying to remember. Write down all the details you can remember. Then review the entire experience and fill in additional details that come to mind. After doing this several times, you will have surprisingly complete information based on your informal observations.

b. Formal observation

Formal observation is a more systematic approach to information gathering. For example, you may want to:

- Do an inventory of supplies or equipment
- Assess the quality of a preventive maintenance program for facilities and equipment
- Investigate the design or contents of a filing system
- Diagram patient or worker activities
- Inspect registries, logs, or other forms
- Inspect work schedules and other information posted in the work place

Formal observation should be done with the full awareness and understanding of the workers involved. Explain the purpose of your observation. Make it clear to the workers that you are not judging them in any way, but that you simply need to obtain reliable information. During the observation, exchange views with the workers. This gives them an opportunity to point out all the factors influencing their activity and often enlists greater cooperation. Always request permission from the person in charge when you want to inspect supplies, registers, or forms. Explain why you want to do the inspection, and invite the person in charge to accompany you.

You usually write down the information gathered through formal observation at the time of the observation. It is important that you do the recording, rather than the person escorting you. Your escort may neglect to include important information. Or, he may write down unimportant information. Give the person escorting you an opportunity to review and add to whatever information you have recorded. Do this immediately following the formal observation and in your presence. This review will:

- Reduce the anxiety of your escort by permitting him to see first-hand what you have recorded
- Supplement the information that you have already recorded
- Give your escort the feeling of having contributed to the process

2.2 INFORMATION GATHERING

You gather information from the sources discussed above in three ways:

- Interviews
- Surveys
- Work flow analysis

Interviews

A structured approach to interviewing is provided in the management system workbook. Many of the forms in Section 3 of the workbook, Information Gathering, are interview forms. Review these basic steps for planning and conducting interviews.

- a. Decide who can provide the information you need

You must first decide what information you need and who can provide that information. For example, a dispenser responsible for drugs and medical supplies at the district level probably knows little about central drug procurement policies and procedures. He may, however, be able to offer some valuable information about drug and medical supply problems, some of which may be caused by drug procurement policies and procedures at the central level.

- b. Arrange your interviews to validate information

Primary health care systems involve personnel at many levels. You need to interview people at each level of the system. Then you must check the information to make sure it is valid. Arrange your interview schedule so that each interview builds on the information of the preceding interviews. For example, suppose you visit and interview the staff of a rural health center. You should also visit and interview the district supervisor in charge of that health center to validate and supplement information gathered at the health center. Similarly, you should visit and interview an official at the central level to validate and supplement information gathered from the district supervisor. This interview validation process also works in reverse. You can begin by interviewing an official at the central level, then someone at the district level, and finally another person at the health center. You validate and improve on the information as you move through the organizational structure of the system. The following example illustrates the interview validation process. The actual problem is not what the first interview indicates it to be.

OFFICIAL INTERVIEWED AT:**INFORMATION OBTAINED:**

- | | |
|------------------------|---|
| 1. Rural health center | "We do not have any penicillin because the district hospital will not cooperate and fill our orders." |
| 2. District hospital | "We cannot fill the health center's orders for penicillin because the central pharmacy will not cooperate and fill our orders." |
| 3. Central pharmacy | "We would fill the district hospital's orders for penicillin if they would fill out the order form properly and send the right number of copies, which they have not been doing." |

Repeat the sequence of interviews several times in different districts or regions. With each visit to the community, you will carry with you an increased understanding of the needs, problems, and potential solutions to problems of the primary health care system. This means that you will be in a better position to pursue in greater detail selected issues and to validate information that you have obtained at the central levels of the primary health care system.

An information validation form is included in the management system workbooks. It is the last form in the Information Gathering section. You will complete an interview validation form and attach it to other workbook forms when you validate them.

c. **Decide where you should interview**

People are usually more comfortable and relaxed, and therefore talk more freely, in their own office or work place. They will also have information there that pertains to their work. Only in cases where the person to be interviewed works in an unusually noisy or crowded place, or where he is likely to be interrupted frequently, should the interview occur elsewhere. In such a case, a nearby room or perhaps outside under a tree is a convenient place for the interview.

Proper sequencing of interviews and the need to interview people at their place of work puts a heavy travel burden on you. In order to avoid unnecessary travel, plan your schedule of interviews carefully, especially the interviews with people at the community level. Schedule interviews to take full advantage of each trip to rural communities. Form 3 in the management system workbook is a monthly activity schedule. You will complete a new form for each month of your study.

d. **Hold a preliminary meeting**

Whenever possible, hold a brief preliminary meeting with the person to be interviewed. Explain the purpose of your interview.

Show a copy of the written authorization for your work. Obtain background records and reports. Agree on a definite time and place for the actual interview. When arranging interviews with health workers located in rural areas, contact the people to be interviewed by telephone or radio. Give them information on the purpose of your upcoming visit. Also, discuss with them when would be a convenient time for the interview. Discuss accommodation and transportation needs, as necessary. Confirm your proposed visit by letter.

e. Prepare for each interview

Carefully review background information and other documents to keep your interviews brief and to the point.

f. Conduct the interview

Begin by explaining the purpose of the interview. Show a copy of an authorization and introduction letter signed by a senior official, if this was not done at a preliminary meeting. Briefly explain the workbook form that you will use for taking notes. It is important that the person being interviewed agrees to your plan to take notes.

Spend a few minutes in friendly conversation. Discuss matters of mutual interest. Voice your enthusiasm for working with the person on this project.

After you have established a pleasant atmosphere for the interview, begin the questioning. Avoid questions that can be answered only "yes" or "no." These questions provide very little information. The best questions are open-ended questions. They usually begin with "what," "how," or "why."

What are the functions of this office?

What are your duties and responsibilities?

What problems do you have?

What solutions do you suggest?

What solutions have others suggested?

How do you carry out your duties and responsibilities?

How much cooperation have you received in trying to solve your problems?

How could your suggested solutions be implemented?

How much time would implementation take?

How do you plan to solve these problems in the future?

Why are things done the way they are?

Why do these problems exist?

Why is it that these problems have not been solved before?

Why not do things in a different way?

Why not change the people doing the work, the place where the work is done, or the way the work is done?

Too many open-ended questions may, however, cause the person being interviewed to respond with shorter and shorter answers. Therefore, mix open-ended questions with two other approaches, the pause and the summary. The pause is a period of silence. By remaining silent at the end of an answer, you signal the person being interviewed to continue. The additional time gives him the opportunity to think of something more to say. An alternative to the pause is a summary, or restatement of what the person being interviewed has just said. However, be careful not to overuse this method. Wait until the person has answered several questions on the same general topic before you summarize his responses.

g. Take careful notes during the interview

Taking notes ensures that nothing is forgotten and also demonstrates to the person being interviewed that you take his views seriously. Write down all suggestions for improvement. Do not commit yourself to following the suggestions offered, but if you decide later to use these suggestions in your study report, you will want to give credit to the person being interviewed.

At the conclusion of the interview, review your notes with the person you have just interviewed. This will:

- Ensure more accurate and complete information

- Generate additional information that will further clarify points and issues

- Relieve apprehension on the part of the person being interviewed about the kind of information you have recorded

h. Close the interview

At the end of the interview, thank the person and express your appreciation of the time he has taken to talk to you. This leaves the way open for another interview in the future, if necessary.

Surveys

You gather information from surveys by formal and informal observation. Some of the forms in Section 3 of the management system workbook, *Information Gathering*, are survey forms.

Occasionally, you may also need information that can be obtained only by asking people working in the system to record their day-to-day activities. For example, you may ask maintenance personnel to list the requests they receive for repair of facilities and equipment during a specified period of time. Normally, you would ask the

worker involved in such a survey to record information and then pass it on to you at an agreed upon time. Since this type of survey means extra work for someone, try to keep the information simple and have the survey last no longer than is necessary for reliability. Remember to explain to everyone involved in the survey why the information is needed and how long the survey period will last.

Work Flow Analysis

It is often useful to study a particular work activity or series of activities in a management system by analyzing the flow of work. This can be done by writing down the steps in sequential order as they occur in the activity. A work flow analysis gives an overall picture of a complicated work activity that cannot otherwise be seen at one time in any one place. It also divides the work activity into simple steps that you can see and understand easily. Form 4 in the management system workbook is a Work Flow Analysis form.

You can use the Work Flow Analysis form to examine problems that involve an entire system, such as the movement of drugs and medical supplies from the manufacturer through the distribution system to the ultimate user in the health center or hospital. Or, you can use it for limited operations such as the dispensing of drugs in a health center or the processing of a requisition form for drugs.

In analyzing a work activity you briefly and clearly describe each step or action that takes place. For example:

STEP NUMBER	ACTION
1	Health worker fills out two copies of leave form
2	Health worker sends original to district health officer and retains copy
3	District health officer reviews form for completeness, and approves or disapproves leave request
4	If approved, district health officer sends form to district finance officer

As you observe the activity and record the steps, make notes that will help you analyze the activity and recommend improvements later. For example, note that the person did not have adequate information to perform the action quickly and well, that the proper equipment was not available, that one person could have done the task as well as two, or that the step appeared to repeat an earlier one.

Then go back and carefully review the activity you have just described. Use the following checklist.

Checklist for Making Improvements

	YES	NO	PARTLY	ACTION TO BE TAKEN
1. Is this step necessary?				
2. Can this step be combined with others?				
3. Should this step be divided and its parts added to other steps?				
4. Is this sequence of steps the best possible? Should the order of these steps be changed?				
5. Can this step be done better in another place?				
6. Can this step be done better by another person or group?				
7. What effect will changing this step have on the other steps?				
8. Can any parts of this step be eliminated, shortened, or changed for the better?				
9. Is this step duplicated elsewhere in the process?				
10. Can some steps be done at the same time as other work taking place, or during storage or transportation times?				
11. Can any work or information be supplied at the beginning of this activity to reduce the overall time and effort required?				

	YES	NO	PARTLY	ACTION TO BE TAKEN
12. Can any work or information be eliminated toward the end of this activity to reduce the overall time and effort required?				
13. Have the persons who do this work been consulted for their ideas on how to make improvements?				

Next, make specific recommendations for change. Be sure to include alternative recommendations. The possible improvements include:

ELIMINATE the action

COMBINE the action with another

CHANGE THE SEQUENCE of the action

CHANGE THE LOCATION of the action

CHANGE THE PERSON involved in the action

IMPROVE the action

Review your recommendations with the persons involved in doing the work. Then, prepare a proposed improved work flow, showing the new steps. Write the proposed steps next to the present steps so that the reader can see where you are suggesting changes.

This completes your analysis of this particular activity. Other analyses may be required of other activities, perhaps of smaller activities within the process you have just analyzed or of a larger activity of which this analysis is a part.

This analysis becomes part of your data sources along with the results of your document reviews, interviews, and observations, which you will use to identify issues and problems and develop suggestions for improvement.

Form 4: WORK FLOW ANALYSIS

This is a general use form for recording and analyzing the flow of work activities. Keep extra copies of this form available to supplement the interview and survey forms that follow.

Activity Repair of district hospital vehicle
 Begins Report of vehicle failure Ends Delivery of repaired vehicle
 Location Apato District Date 21 February 1983

PRESENT METHOD		PROPOSED METHOD	
Step Number	Action	Step Number	Action
1	Driver reports brake failure	1	Driver reports brake failure
2	District health officer inspects vehicle and writes request for repair order	2	District health officer inspects vehicle and writes request for repair order
3	District health officer sends order to regional vehicle workshop	3	Driver delivers vehicle to regional workshop with request for repair order
4	Workshop foreman reviews and approves order	4	Workshop foreman inspects vehicle
5	Workshop foreman returns order to district health officer	5	Workshop foreman writes work order and spare parts order, and schedules mechanic
6	Driver delivers vehicle to regional workshop	6	Vehicle waits for availability of mechanic
7	Workshop foreman inspects vehicle	7	District stores provide spare parts
8	Workshop foreman writes work order and spare parts order	8	Mechanic performs repairs
9	Parts order delivered to national warehouse	9	Workshop foreman inspects completed work and signs work order
10	National warehouse fills order (A series of sub-steps are involved in the warehouse for processing the order)	10	Messenger informs district health officer that vehicle is ready
11	Brake linings delivered to regional workshop		

Handwritten initials

Form 4: WORK FLOW ANALYSIS

This is a general use form for recording and analyzing the flow of work activities. Keep extra copies of this form available to supplement the interview and survey forms that follow.

Activity Repair of district hospital vehicle, page 2

Begins _____ Ends _____

Location _____ Date _____

PRESENT METHOD		PROPOSED METHOD	
Step Number	Action	Step Number	Action
12	Vehicle waits for availability of mechanic (may take as long as 30 days)	11	Driver returns to workshop to pick up repaired vehicle
13	Mechanic performs repairs (4 hours)	12	Driver delivers vehicle to district hospital
14	Workshop foreman inspects completed work and signs work order	13	District health officer inspects vehicle and approves repairs
15	Next available messenger informs district health officer that vehicle is ready	(NOTE: The proposed method assumes the installation of a decentralized spare parts system, for at least common spare parts such as brake linings for hospital vehicles, as required here.)	
16	Driver returns to workshop to pick up repaired vehicle		
17	Driver delivers vehicle to district hospital		
18	District health officer inspects vehicle and approves repairs		

REVIEW QUESTIONS
**Gathering Information for a
Management Analysis Study**

1. What are the three basic sources of information for a management analysis study?

2. What kinds of information can you obtain through observation?

3. Who should you interview?

4. Why should you interview people at their place of work?

5. What are the advantages of seeing someone to be interviewed before the interview actually takes place?

6. What is an open-ended question?

7. What is the purpose of a work flow analysis?

8. TRUE (T) or FALSE (F)
 Written records and reports are your most importance sources of information.
 Written records and reports usually provide reliable and accurate information.

- When you gather information through formal observation, everyone involved should be fully aware that they are being observed.
- One advantage of a work flow analysis is that it breaks down the work process into highly complex steps.

EXERCISE 5

Identifying Written Documents for a Management Analysis Study

SITUATION

Records and reports often contain information on the management system you are studying. Sources of records and reports include:

- The central government library, archives, or records department
- The central ministry of health library
- The central ministry of health records department
- The private libraries of senior administrators and management specialists involved in the system
- The central government office responsible for the system
- Field offices

This exercise gives you an opportunity to identify sources of information about the management system you are studying.

YOUR ASSIGNMENT

STEP 1

Your instructor will arrange for you to visit one or more locations to search for records that relate to the management system you are studying. Question people at the location. Also search records, such as personnel directories, organization charts, and correspondence files. Identify and list on the **Worksheet for Exercise 5** all the possible information sources that you identify. The **Worksheet for Exercise 5** is a copy of Form 2 in the management system workbook.

STEP 2

Locate documents that give information about laws, policies, procedures, and practices related to the management system you are studying.

STEP 3

Complete the **Worksheet for Exercise 5**. Record the title, author, publisher, and date of publication for each document that you identify.

STEP 4

Take part in a class discussion on the difficulties you encountered in

gathering the information on the worksheet. Also discuss ways to overcome such difficulties in the future.

STEP 5

Keep your completed worksheet for future reference and use.

WORKSHEET FOR EXERCISE 5: Identifying Written Documents for a Management Analysis Study

Form 2: LIST OF DOCUMENTS REVIEWED

Record the title, author, publisher, and date of publication for every major written document that you review for your study. Also include the date of the review and the source of the document. The information on this form will be included as an appendix to your written study report and will serve as your reference bibliography.

TITLE	AUTHOR	PUBLISHER/ DATE OF PUBLICATION	DATE REVIEWED	SOURCE OR LOCATION

EXERCISE 6

Reviewing Written Documents for a Management Analysis Study

SITUATION

Information about the system you are studying must be factual, objective, and up-to-date. Therefore, you should review records and reports before you use the information contained in them. This exercise gives you an opportunity to evaluate a management report.

YOUR ASSIGNMENT

STEP 1

Your instructor will give you a copy of a management report. Read the report carefully.

STEP 2

Use the questions on the Worksheet for Exercise 6 to evaluate the report.

STEP 3

Take part in a class discussion of the exercise.

STEP 4

Give your completed worksheet to the instructor for review and evaluation.

WORKSHEET FOR EXERCISE 6
Reviewing Written Documents for a
Management Analysis Study

Use this worksheet to evaluate a management report. Answer the questions below.

Title of report _____

Author of report _____

Publisher of report _____ Date of publication _____

1. Is the report primarily factual or subjective? Give two examples.

2. Is the report thorough or superficial? Give two examples.

3. Is the report biased? If so, how? Give two examples.

4. Is the report out-of-date? If so, why?

5. Does the report offer solutions to problems? If so, name one problem and describe the recommended solutions.

EXERCISE 7

Gathering Information through Informal Observation

SITUATION

Informal observation can tell you a lot about how an office is managed and organized. This exercise gives you an opportunity to visit an office and record informal observations.

YOUR ASSIGNMENT

STEP 1

Visit a nearby office. Walk through the office, and observe the physical environment and the activities of the workers.

STEP 2

Return to the classroom. Describe what you observed in the office. Record this information on the Worksheet for Exercise 7.

STEP 3

Report your observations to the class. The instructor will write the observations on the chalkboard.

STEP 4

Take part in a class discussion on what you and the other class members observed and why you observed different things.

STEP 5

Visit a different office. Repeat the exercise.

STEP 6

Give your completed worksheets to the instructor for review and evaluation.

EXERCISE 8

Gathering Information through Formal Observation

SITUATION

This exercise gives you an opportunity to formally observe the work activities of a person in an office. You should make a formal observation only with the full cooperation of the office to be visited and of the individual to be observed.

YOUR ASSIGNMENT

STEP 1

Your instructor will take you to an office and introduce you to the office manager and to the person to be observed.

STEP 2

Explain the purpose of the observation to the person to be observed. Observe the person's work activities.

STEP 3

Take notes on everything you observe about the person's activities. Do not interview the person or ask questions. Sit silently and observe the person for one hour.

STEP 4

Return to the classroom and prepare a written report on the person's activities based on your observation notes. Suggest how the activities of the person could be changed to improve his efficiency or effectiveness in his job.

STEP 5

Give your report to the instructor for review and evaluation.

STEP 6

The instructor will review your report and evaluate it for accuracy and completeness.

STEP 7

Take part in a class discussion of the strengths and weaknesses of the reports.

EXERCISE 9

Gathering Information through a Personal Interview

SITUATION

You can obtain a great deal of information through personal interviews. This role-play exercise gives you an opportunity to practice this technique in the roles of interviewer and interviewee.

YOUR ASSIGNMENT

STEP 1

The instructor will divide the class into groups of three and assign the roles of interviewer, interviewee, and observer to the members of each group.

STEP 2

The interviewer conducts the interview. The objective of the interview is to learn as much as possible about the career history of the person being interviewed. The interviewer should follow the guidelines for interviewing discussed in Unit 2. Each interview should last about thirty minutes. The observer should complete the Worksheet for Exercise 9.

STEP 3

Change roles and repeat the exercise so that each student has the opportunity to play the role of interviewer, interviewee, and observer.

STEP 4

Report to the class on your observation notes. Take part in a class discussion about the exercise.

STEP 5

Prepare a written report based on the information you obtained in the interview. Give the report to the student you interviewed.

STEP 6

Review the report that was written about you. Make written comments on the accuracy and completeness of the report.

STEP 7

Give your written report and student comments to the instructor for review. Take part in a class discussion of the exercise.

WORKSHEET FOR EXERCISE 9
Gathering Information through a
Personal Interview

1. Did the interviewer adequately explain the purpose of the interview?

Yes ___ No ___

Comments _____

2. Did the interviewer explain that he would be taking notes?

Yes ___ No ___

Comments _____

3. Did the interviewer develop a relaxed and cooperative atmosphere by starting out with friendly conversation?

Yes ___ No ___

Comments _____

4. Did the interviewer obtain complete and factual information through his line of questioning?

Yes ___ No ___

Comments _____

5. Did the interviewer use open-ended questions beginning with "what," "how," and "why" to allow the interviewee to contribute full information?

Yes ___ No ___

Comments _____

6. At the end of the interview, did the interviewer review his notes with the person being interviewed?

Yes ___ No ___

Comments _____

7. Did the interviewer adequately thank the interviewee and close the interview on a constructive note?

Yes ___ No ___

Comments _____

8. Describe any special strengths you noticed in the interviewer's performance.

9. Rank the interview. Place a check (✓) in the appropriate box.

	VERY POOR	POOR	FAIR	GOOD	EXCELLENT
Completeness and clarity					
Understanding between the two participants					
Quality of the information received					

EXERCISE 10

Gathering Information through a Personal Interview Using a Workbook Form

SITUATION

You are now familiar with the basic forms included in the management system workbooks. This exercise gives you an opportunity to practice interviewing a person using a form from a management system workbook.

YOUR ASSIGNMENT

STEP 1

Worksheet A for Exercise 10 is a copy of Form 5 from the Facilities and Equipment Maintenance System Workbook. Worksheet B for Exercise 10 is an observer's rating sheet. Study both worksheets to become familiar with the questions you will ask as the management analyst and also how you will be evaluated by the observer.

STEP 2

The instructor will divide the class into groups of three. The students in your group will take turns playing the following roles:

Person in charge of a rural health center

Management analyst

Observer

STEP 3

Conduct the first role-play. The management analyst will conduct the interview and complete Worksheet A. The observer will listen to the interview and complete Worksheet B, the observer's rating sheet.

STEP 4

After each interview, the observer will report on his observations.

STEP 5

Repeat the role-plays until each member of the group has played all three roles.

STEP 6

Take part in a class discussion of the exercise.

STEP 7

Give your worksheets to the instructor for review and evaluation.

WORKSHEET A FOR EXERCISE 10: Gathering Information through a Personal Interview: Using a Workbook Form

Form 5: PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

This form will help you conduct an inventory of primary health care facilities and equipment. The person in charge of the facility should accompany you as you inspect and inventory the facilities and equipment. Survey each building room-by-room. Assess the condition of each item using the following scale:

- 1 -- Excellent
- 2 -- Good
- 3 -- Fair
- 4 -- Poor
- 5 -- Needs repair before further use
- 6 -- Needs to be replaced

Whenever an item needs better maintenance or repair, obtain an estimate of how long it has been in its present condition.

Facility inspected _____	Location _____
Person interviewed _____	Title _____ Location _____ Date _____
<input type="checkbox"/> Community <input type="checkbox"/> Health post <input type="checkbox"/> Population served _____	<input type="checkbox"/> Health center <input type="checkbox"/> District <input type="checkbox"/> Number of service contacts per month _____
<input type="checkbox"/> Region <input type="checkbox"/> Central Ministry of Health	<input type="checkbox"/> Other _____
1. Who owns your facility?	
2. Who originally provided your facility?	
3. Who is responsible for facility maintenance and repair?	

4. What are the main problems with the facility?

5. Who provided your equipment?

6. Who is responsible for equipment maintenance and repair?

7. Do you have any problems with equipment maintenance and repair?

8. Do you have any additional comments?

WORKSHEET B FOR EXERCISE 10
Gathering Information through a
Personal Interview Using a Workbook Form

1. Did the interviewer adequately explain the purpose of the interview?

Yes ___ No ___

Comments _____

2. Did the interviewer earn the cooperation of the health center official?

Yes ___ No ___

Comments _____

3. Did the interviewer state each question clearly, and explain it if there were problems in being understood?

Yes ___ No ___

Comments _____

4. Did the interviewer cover all questions adequately?

Yes ___ No ___

Comments _____

5. Did the interviewer obtain complete answers?

Yes ___ No ___

Comments _____

6. Did the interviewer raise other questions or points in order to clarify the information and obtain a complete and accurate report of conditions?

Yes ___ No ___

Comments _____

7. Was the interview:

Too hurried? ___ Too slow? ___ About right in length? ___

Comments _____

9. Describe any special strengths you noticed in the interviewer's performance.

10. Rank the interview. Place a check (✓) in the appropriate box.

	VERY POOR	POOR	FAIR	GOOD	EXCELLENT
Completeness and clarity					
Understanding between the two participants					
Quality of the information received					

EXERCISE 11

Conducting a Work Flow Analysis from a Case History

SITUATION

A work flow analysis can help you identify problems in an organization. This exercise will give you experience in analyzing a work flow from a case history. The following case history describes how a Request for Leave form is processed. This is the kind of information you would normally gather during an interview. It is given to you here in writing, however, so that you can complete a work flow analysis.

District health officer:

"We have had a lot of trouble with mid-level health workers either forgetting to send in a Request for Leave form or sending it in so late that I have difficulty getting it approved before they want to go on leave. Sometimes they do not even have a form to send in because they forget to order more forms when they run out."

Management analyst:

"From whom do mid-level health workers order the forms?"

District health officer:

"They are supposed to order them directly from the central ministry of health personnel office. I keep a small emergency supply here in case they cannot get them from the central personnel office."

Management analyst:

"So what do they have to do to order Request for Leave forms?"

District health officer:

"They have to simply mail a written request to the ministry of health personnel officer. He will send them a small supply of forms. As I was saying, much of the problem is that the mid-level health workers either forget to submit the Request for Leave form or submit it so late that we cannot process it by the time they want to go on leave. They are supposed to fill out two

copies of the form and keep one for themselves and send the other to me. When I receive the form, I turn it over to the district administrative officer who checks it for completeness and then gives it to the district finance officer who checks the leave records to ensure that they have leave time available. If they do, the finance officer signs the form, sends it back to the administrative officer who makes sure there will not be any administrative problems in the absence of the mid-level health worker, signs the form, and sends it to me.

I make the final decision as to whether or not leave will be granted. If I grant the leave, I sign the form and send it back to the mid-level health worker, who is supposed to sign the form to acknowledge that his leave has been approved and return it to me. I then give it to the administrative officer. I believe that he in turn gives it to his personnel clerk who enters the amount of leave on the financial officer's master leave record form and then files the request form.

The entire processing procedure usually requires a minimum of two or three weeks. When leave is needed on shorter notice, we usually give verbal approval and do all the paper processing after the mid-level health worker returns from leave."

YOUR ASSIGNMENT

STEP 1

Review the case history. Select and write the appropriate information in the present method column on the Worksheet for Exercise 11. The worksheet is a copy of the Work Flow Analysis form from the management system workbook. Make sure you describe every step.

STEP 2

Exchange your worksheet with another student. Take part in a class discussion. Review and compare your worksheets and make corrections.

STEP 3

Fill in the second part of the worksheet describing a proposed method. Use the Checklist for Making Improvements in Unit 2.

STEP 4

Exchange your completed worksheet with another student. Review and compare your worksheets and make corrections.

STEP 5

Take part in a class discussion of this exercise. Make further notes and corrections on your worksheets.

STEP 6

Give your revised worksheet to the instructor for review and final evaluation.

WORKSHEET FOR EXERCISE 11: Conducting a Work Flow Analysis from a Case History

Form 4: WORK FLOW ANALYSIS

This is a general use form for recording and analyzing the flow of work activities. Keep extra copies of this form available to supplement the interview and survey forms that follow.

Activity _____	
Begins _____	Ends _____
Location _____	Date _____

PRESENT METHOD		PROPOSED METHOD	
Step Number	Action	Step Number	Action

EXERCISE 12

Conducting a Work Flow Analysis from an Existing Situation

SITUATION

Your instructor will arrange for a field exercise to give you practical experience in conducting a work flow analysis in an actual situation.

YOUR ASSIGNMENT

STEP 1

Your instructor will introduce you to the person in charge of the management system where you will be doing this exercise. You may chart a method for processing a form or an operation that takes place such as referring a patient or operating a well-baby clinic.

STEP 2

Interview the key official to learn as much as possible about the process you are going to study and the names and locations of people who are involved.

STEP 3

Arrange interview times with the people you identified in Step 2.

STEP 4

Interview all the people according to the interview times that you arranged.

STEP 5

Conduct a work flow analysis for the present method from the information you gather through these interviews. Fill in the present method on the **Worksheet for Exercise 12**. This worksheet is a copy of the **Work Flow Analysis form** from the management system workbook. You may need to arrange additional interviews to fill in gaps in the steps you have identified and described. During the interviews, verify each step you describe. Ask those you interview for suggestions for improving the process.

STEP 6

Complete the work flow analysis by describing a proposed method. Use the **Checklist for Making Improvements in Unit 2**.

STEP 7

Return to the classroom. Exchange your completed worksheet with another student. Review and compare the worksheets and make corrections. Take part in a class discussion on the exercise.

STEP 8

Submit your worksheet to the instructor for review and discussion.

STEP 9

Revise the worksheet as suggested by your instructor.

STEP 10

Give a copy of the revised worksheet to the person in charge of the system you studied. You and your instructor will then meet with this person to review your work.

WORKSHEET FOR EXERCISE 12: Conducting a Work Flow Analysis from an Existing Situation

Form 4: WORK FLOW ANALYSIS

This is a general use form for recording and analyzing the flow of work activities. Keep extra copies of this form available to supplement the interview and survey forms that follow.

Activity _____	
Begins _____	Ends _____
Location _____	Date _____

PRESENT METHOD		PROPOSED METHOD	
Step Number	Action	Step Number	Action

Unit 3

Summarizing and Analyzing Information for a Management Analysis Study

STUDENT GUIDE

OBJECTIVES

1. Describe the methods used to gather and validate information.
2. Summarize information on findings and use this information to formulate conclusions.
3. Identify and select alternative recommendations for improving a management support system.

LEARNING ACTIVITIES

1. Read Unit 3 in the Student Text and answer the review questions.
2. Take part in a class discussion of the review questions.
3. Take part in an exercise on summarizing subjective information.
4. Take part in an exercise on summarizing information from workbook forms.
5. Take part in an exercise on listing findings and conclusions based on summary information.
6. Take part in a case study exercise on identifying alternative recommendations.
7. Take part in a brainstorming session to identify and rank alternative recommendations and solutions according to priority.
8. Complete the introductory section of the management system workbook on study methodology.

3.1 SUMMARIZING AND ANALYZING INFORMATION

Summarizing and analyzing the information you have gathered is the next step in completing a management study. By this time, you will have gathered a vast amount of information from a wide variety of sources. Some information will likely be contradictory and illogical. Some information will be biased. Other information will be incorrect. The information you have gathered will not be a true picture of the system you are studying. You must summarize and analyze the information to get a better picture of the system. You use the summary forms in the management system workbook to summarize information. You use the problem-solving and alternative recommendations forms to analyze information. Analyzing information involves organizing the information into findings and conclusions, identifying solutions, and proposing and justifying alternative recommendations.

3.2 SUMMARIZING INFORMATION

You summarize the information gathered from interviews and surveys to organize the information and evaluate the subjective statements that you have recorded. You summarize the information for each organizational level of the primary health care delivery system. Exercises 13 and 14 will give you an opportunity to summarize information from workbook forms. The summary forms in the management system workbook will guide you in this process when you are conducting a management analysis study.

3.3 DETERMINING THE OBJECTIVES AND FUNCTIONS OF THE SYSTEM

After you summarize your information, you are in a position to state the objectives of the system you are studying and define its functions. You

determine the objectives and functions of the system at this stage of the study rather than at the beginning to avoid bias and to ensure greater reliability of your results by not forcing the information to conform to pre-conceived ideas. You will use the two forms in Section 4 of the management system workbook to record the objectives and functions. In the first, you will list both the present objectives and those that you are proposing. In the second, you will list the functions of the system and the responsibility for these functions at each organizational level.

3.4 DEVELOPING FINDINGS AND CONCLUSIONS

After you determine the objectives and functions of the system, you develop findings and conclusions. A finding is a statement that describes a problem. If you gather information from a representative sample of sources, you will usually find that certain problems are mentioned again and again. Eventually, you will be able to write a complete description of these problems based on the information you have gathered. Each of these descriptions is a finding. A conclusion is a summary of your findings. As you gather and analyze information and prepare your findings, you will discover that problems are often interrelated.

Conclusions describe the relationships among problems.

A system's management problems usually fall into three categories. They can be problems of the formal structure of the system, of the resources of the system, or of the behavior of people in the system. Each type of problem requires a different type of solution.

The formal structure of a management system includes its laws, regulations, policies, and procedures. It also includes the organizational structure and the assigned roles, duties, and responsibilities of the people working in the system. The resources of the system are the funds, personnel, space, equipment, and supplies that the system needs to function. For a system to function well, resources must be present in sufficient quality and quantity, at the right time, and in the right place. The behavior of people in the system refers to the way people working in the system act. It includes their knowledge and skills, their motivation, incentives, coordination, communication, and interpersonal relations. It also includes the ability of people to focus on objectives and to solve problems and resolve conflicts in order to achieve their objectives.

A system's management problems are often a combination of deficiencies in all of the three categories, but not always in equal amounts. The

management system workbooks are designed to help you determine into which category or categories a problem falls. Exercise 15 will give you practice in preparing findings and conclusions based on your summaries of information. You record findings and conclusions on the Summary of Findings and Conclusions form in the management system workbook.

3.5 DISTINGUISHING BETWEEN CAUSES AND SYMPTOMS

Your job as a management analyst is to uncover the underlying, or root, causes of problems in the system you are studying so that appropriate changes can be made to solve the problem. You must remember to focus on these root causes rather than only on the symptoms of the problems. Treating symptoms usually does not solve problems, and in many cases actually makes problems worse. Problems in a complex system often have many symptoms as well as root causes, and such problems often have a chain relationship. The following diagram shows an example of such a chain relationship.

Finding	Symptom or Cause of Problem
Absence of needed drugs at the health center, due to:	Symptom
Slow response by central pharmacy to filling drug orders, due to:	Symptom
Understaffing of central pharmacy warehouse, due to:	Symptom
High absenteeism of central pharmacy employees because of illness, due to:	Symptom
Worker fatigue, due to:	Symptom
High temperature in warehouse, due to:	Symptom
Uninsulated metal galvanized roof	Root Cause

A clear definition of the root cause will often disclose relatively simple solutions to a problem that is reflected in various symptoms. You discover the root cause of a problem by gathering information, reviewing it in the context of the overall system, and looking for a relationship, as illustrated in the diagram above. When you formulate conclusions, you identify the underlying or root cause of the chain of problems. When the root cause is carefully described, solutions often become easy to identify.

3.6 ANALYZING PROBLEMS AND FINDING SOLUTIONS

After you have organized your information into findings and conclusions, you can begin to identify solutions. These solutions become your recommendations for solving problems. You can analyze problems and find possible solutions in four ways:

- Observations and interviews
- Brainstorming
- Work flow analysis
- Step-by-step analysis using problem-solving forms

Observations and Interviews

Your findings and conclusions identify the problems in the system you are studying and their root causes. These have been developed through your observations, the documents you have studied, and the interviews you have conducted. During this process you will have identified a number of possible solutions. For each conclusion, you will list these possible solutions on the Alternative Recommendations form in the management system workbook. Exercise 16 will guide you in this process.

As with the work flow analysis discussed in Unit 2, there are usually many possible actions to consider when developing alternative solutions. These include the following:

a. **Eliminate**

Sometimes a policy, procedure, or function is not really needed. It may be an obstacle to good management performance. For example, an extra review of a document may slow action and contribute nothing. In that case, you can eliminate the extra review.

b. Combine

Combining procedures or functions sometimes saves resources and results in better performance. For example, you can suggest combining the delivery of supplies with supervisory visits.

c. Change sequence

Changing the order in which work is performed can sometimes save resources and time and improve performance. For example, you can suggest performing routine preventive maintenance instead of carrying out periodic equipment repair, or inspecting a drug shipment before signing the receipt voucher.

d. Change location

Sometimes changing the location of a work activity can significantly improve management performance. For example, you can suggest delegating authority to district offices for recruiting, selecting, employing, and disciplining guards or drivers.

e. Change person

Sometimes a person assigned a responsibility is not the best person to perform it. For example, the approval of sick or annual leave for health workers at a health center may best be done by their supervisor rather than by a central ministry of health official.

f. Improve

A work activity or situation can be improved in many ways, such as developing better work procedures, re-designing forms to reduce the risk of errors, improving the knowledge and skills of workers through training, implementing better performance incentives for workers, and purchasing better tools for workers.

Study the problem illustrated on the chart below. Consider alternative solutions.

The problem: An uninsulated metal galvanized roof

FIRST CONSIDER:	THEN THINK OF POSSIBLE SOLUTIONS:
Eliminate	Cannot do this
Combine	Not applicable
Change sequence	Not applicable
Change location	Move the drug supply warehouse to a better building
Change person	Not applicable

FIRST CONSIDER:

Improve

THEN THINK OF POSSIBLE SOLUTIONS:

Have the roof insulated

Replace the roof

Build a new roof over the
existing roofInstall air conditioning in
the buildingInstall exhaust fans in the
building

You now have six alternative recommendations for senior officials to consider. In order for them to intelligently judge which solution is most feasible, you should obtain cost estimates and other information for each alternative. You should include this information with the recommendations in your study report.

Brainstorming

Brainstorming is a way to get many ideas for solving a problem in a short period of time. You bring together in a meeting a group of people who know a lot about the subject. You clearly state the problem and ask them to express as quickly as possible all conceivable ideas for solutions. As the purpose is to stimulate creativity, you allow no criticism or evaluation of the ideas during the brainstorming session. To further stimulate the flow of ideas, you set goals. For example, you decide to gather twenty-five ideas in fifteen minutes. You encourage the participants to express a variation or adaptation of an idea expressed immediately before. This process encourages spontaneity. It is not unusual to get as many as fifty or even one hundred ideas in a single brainstorming session.

You evaluate the ideas and weigh their relative merits later. Obviously, you will discard the majority of the ideas, but usually a few good ones remain. After you have evaluated the ideas, include the remainder on the Alternative Recommendations form in the management system workbook. Exercise 17 will guide you in this process.

Work Flow Analysis

A work flow analysis can also help you develop solutions. A work flow analysis provides a systematic, step-by-step method for analyzing an activity and for identifying ways to improve it. Use the results of your work flow analysis as additional references for

developing your final alternative recommendations in the management system workbook.

Step-by-Step Analysis Using Problem-Solving Forms

A useful method for developing solutions is a step-by-step problem-solving process using workbook forms. This process helps you clearly define the problem, list its root causes, examine both constraining and helping forces for its solution, and then weigh the advantages and disadvantages of alternative solutions. Three problem-solving forms are included in the management system workbooks for this purpose. You will practice using the forms in Exercise 18. Here is a brief explanation of each form with illustrations of how they can be used.

a. Statement of Problem and Root Causes form

Use this form to state each problem that you identify and its root cause or causes. Answer these questions to state a problem:

What is the problem?

How does the problem affect health management?

How severe is the impact?

Where does the problem occur?

Who is affected by the problem?

Who is responsible for the work activity where the problem occurs?

After stating the problem in this way, describe in concise terms the root cause or causes of the problem. Be sure to distinguish causes from symptoms. This completed form provides you with a definition of the problem and its root causes. It is the basis for further analysis.

b. Analysis of Forces Affecting Change form

Use this form to identify factors that either constrain your actions toward reaching a solution or help you reach a solution. These factors may include the attitudes of key officials, the receptivity or resistance of the community, the appropriateness or inappropriateness of technology, the availability or lack of trained manpower, the availability or lack of funds, the support or lack of support from other sectors, and the availability or lack of transportation. Listing factors like these will help you identify alternative approaches to problem-solving and to weigh their advantages and disadvantages.

c. Alternative Problem-Solving Approaches form

Use this form to identify and examine alternative approaches to

solving a problem. This completed form becomes a reference for developing your final recommendations.

Use one, all, or a combination of these four methods for finding possible solutions to the management problems identified in the information gathering phase of your work. Make a list of the results of these analyses. With this list, you are now in a good position to identify alternative recommendations on the final workbook form.

3.7 PROPOSING AND JUSTIFYING ALTERNATIVE RECOMMENDATIONS

You will use the Alternative Recommendations form to prepare your final list of recommendations. The Alternative Recommendations form is the last form in your system workbook. You will fill out one form for each conclusion that you identify on the Summary of Findings and Conclusions form. Be sure to suggest at least two or three alternative recommendations for each conclusion. You will submit these recommendations to others in the group decision-making process for management systems improvement that will follow your report. For a variety of reasons they may select other than your first priority recommendation. It is important that they be given alternatives to help them make the best possible decision. Rank the recommendations according to priority, with the most desirable listed first.

You should also draft a short justification statement for each recommendation. Explain why the recommendation is desirable. For example, state that it "is low-cost, high impact," "will raise costs six cents per capita, but will extend health services to an additional twenty percent of the population in rural areas," "will reduce manpower costs by twenty percent," or "will regain public confidence and build the morale of the staff." Be specific and factual in stating a justification. Use percentages and figures whenever possible.

REVIEW QUESTIONS
Summarizing and Analyzing Information
for a Management Analysis Study

1. Why does a management analyst need to summarize and analyze information?

2. From what you have read and experienced yourself, describe at least three categories of management problems.

3. Give an example of a root cause of a problem.

4. List the four methods you can use for analyzing problems and finding solutions.

5. TRUE (T) or FALSE (F)
 - ___ You will sometimes find inconsistencies in the information you have obtained.
 - ___ One obvious recommendation usually results from information summary and analysis.
 - ___ The management analyst should take into consideration the behavior of individuals when preparing findings and conclusions.
 - ___ Problems in a management system could be a result of earlier decision-making which treated symptoms of problems rather than root causes.
 - ___ You carefully evaluate ideas for solutions to problems as they are expressed during a brainstorming session.
 - ___ One method for analyzing problems and finding solutions involves a step-by-step process to identify forces affecting change.

EXERCISE 13

Summarizing Subjective Statements

SITUATION

A management analyst was assigned to study the drugs and medical supplies system. He conducted interviews and reviewed forms, documents, and procedures. He gave particular emphasis to the opinions of well-informed people working in the drugs and medical supplies system.

During his interview, the district health officer said, "The drugs and medical supplies system has many problems. These problems include the receiving of drugs, complicated inventory procedures, the remaining shelf-life of drugs when received, a shortage of supplies at the central pharmacy warehouse, the need for better local purchasing procedures, and the need for a standard formulary."

A mid-level health worker said, "I have discovered that several drugs available from local shops are less expensive than drugs supplied by the central pharmacy warehouse. So, I have made local purchases. But the accounting office does not process the local purchase vouchers, and the local shops are refusing to sell me more drugs."

The chief accountant at the district office said, "This office is understaffed. We are so busy preparing payrolls and doing other routine accounting activities that I have made the processing of local purchase vouchers a low priority."

The director of the central pharmacy said, "The combined medical supplies budgets of the regional health posts are far greater than my entire annual medical supplies budget. Also, there are several unfilled staff vacancies at the central pharmacy warehouse."

YOUR ASSIGNMENT

STEP 1

Read the four subjective statements listed above.

STEP 2

Summarize these statements.

STEP 3

Meet in small groups. Compare and discuss your summary

statements. Consider similarities and differences in the summaries. Develop rules to follow in summarizing information.

STEP 4

Take part in a class discussion about rules to follow in summarizing information.

STEP 5

Rewrite your summary statements.

STEP 6

Give your statements to the instructor for review and evaluation.

EXERCISE 14

Summarizing Information from Workbook Forms

SITUATION

You are a management analyst. You have just completed a survey of facilities and equipment at five rural health centers. The information you gathered is recorded on five workbook forms. You now have to summarize this information.

YOUR ASSIGNMENT

STEP 1

Read and study the five completed workbook forms.

STEP 2

Summarize the information on the Worksheet for Exercise 14. The worksheet is a copy of a summary form from the Facilities and Equipment Maintenance System Workbook.

STEP 3

Take part in a class discussion on the exercise. Revise your summary form based on what you learned in the discussion.

Rewrite your summary on a new worksheet. Give the completed worksheet to your instructor for review and evaluation.

Form 5: PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

This form will help you conduct an inventory of primary health care facilities and equipment. The person in charge of the facility should accompany you as you inspect and inventory the facilities and equipment. Survey each building room-by-room. Assess the condition of each item using the following scale:

- 1 -- Excellent
- 2 -- Good
- 3 -- Fair
- 4 -- Poor
- 5 -- Needs repair before further use
- 6 -- Needs to be replaced

Whenever an item needs better maintenance or repair, obtain an estimate of how long it has been in its present condition.

Facility inspected <u>Elenia Health Center</u>		Location <u>Jas Adena District</u>	
Person interviewed <u>L. Kohla</u>		Title <u>Mid-level Health Worker</u>	Date <u>4 March 1983</u>
<input type="checkbox"/> Community	<input checked="" type="checkbox"/> Health center	<input type="checkbox"/> Region	<input type="checkbox"/> Other _____
<input type="checkbox"/> Health post	<input type="checkbox"/> District	<input type="checkbox"/> Central Ministry of Health	
Population served _____		Number of service contacts per month _____	
1. Who owns your facility? <i>Salvation Army</i>			
2. Who originally provided your facility? <i>Donated to Salvation Army by leading industrialist</i>			
3. Who is responsible for facility maintenance and repair? <i>Handle it ourselves, with some help from ministry of health</i>			

4. What are the main problems with the facility?

*Original construction was not termite proof, resulting in continuing termite problems.
Inadequate water supply.*

5. Who provided your equipment?

Some by Salvation Army; some by ministry of health.

6. Who is responsible for equipment maintenance and repair?

Handle it ourselves, with some help from ministry of health

7. Do you have any problems with equipment maintenance and repair?

Water pump breakdown, generator maintenance

8. Do you have any additional comments?

Building generally well-maintained, clean, and in good repair. New mosquito screening is needed.

Inventory of Grounds, Facilities, and Equipment			
ITEM		ISSUES AND PROBLEMS	SUGGESTIONS FOR IMPROVEMENT
Description	Condition		
Grounds		Well kept	None
Fencing		Needs minor repairs	Repairs can be done by health center staff
Demonstration garden		Excellent	None
Access road		Troublesome in rainy season Needs gravel	Request community to supply gravel
Buildings		Generally in good repair Termite damage	Request rebuilding of concrete foundation by Salvation Army Request termite damage repair by Department of Public Works
Waiting area		Covered area needs to be enlarged	Request of Salvation Army in next budget
General painting		Paint beginning to deteriorate	Staff to do patch up painting now Request Department of Public Works to do
General equipment		Well-maintained and in good repair	None
Water pump		Requires continued attention Needs new parts	Request rebuilding of water pump by Ministry of Health
Generator		Requires improved preventive maintenance	Conduct training for staff in proper operation and preventive maintenance

Form 5: PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

This form will help you conduct an inventory of primary health care facilities and equipment. The person in charge of the facility should accompany you as you inspect and inventory the facilities and equipment. Survey each building room-by-room. Assess the condition of each item using the following scale:

- 1 -- Excellent
- 2 -- Good
- 3 -- Fair
- 4 -- Poor
- 5 -- Needs repair before further use
- 6 -- Needs to be replaced

Whenever an item needs better maintenance or repair, obtain an estimate of how long it has been in its present condition.

Facility inspected <u>Caloni Health Center</u>		Location <u>Caloni District</u>	
Person interviewed <u>B. N. Brand</u>		Title <u>Mid-level Health Worker</u>	Date <u>17 January 1983</u>
<input type="checkbox"/> Community	<input checked="" type="checkbox"/> Health center	<input type="checkbox"/> Region	<input type="checkbox"/> Other _____
<input type="checkbox"/> Health post	<input type="checkbox"/> District	<input type="checkbox"/> Central Ministry of Health	
Population served _____	Number of service contacts per month _____		
1. Who owns your facility? <i>Ministry of health</i>			
2. Who originally provided your facility? <i>Ministry of health</i>			
3. Who is responsible for facility maintenance and repair? <i>Department of public works</i>			

4. What are the main problems with the facility?

Very old building, in run-down condition. Needs major repairs, new roof, covered waiting area, larger enclosed space for consulting, treatment, and dispensing functions

5. Who provided your equipment?

Ministry of Health

6. Who is responsible for equipment maintenance and repair?

Ministry of Health

7. Do you have any problems with equipment maintenance and repair?

Old equipment; much of it needs replacing

8. Do you have any additional comments?

This facility has fallen in general disrepair. It needs a major rebuilding which will require capital funding

Inventory of Grounds, Facilities, and Equipment			
ITEM		ISSUES AND PROBLEMS	SUGGESTIONS FOR IMPROVEMENT
Description	Condition		
Grounds		Surface drainage is very poor Weeds have taken over	Get department of public works to design drainage plan Get community labor to develop it Get community health committee to assume responsibility for keeping grounds clean and weeded Start community demonstration garden
Access road		None	Develop access road as part of drainage plan
Building	Outside waiting area often turns to mud or dust There is not enough space for basic functions of health care. A new consulting room would free up space for expanded treatment and dispensing areas Latrine is in poor repair Well needs cleaning and relining	This is an old facility, which has not been given adequate attention	Get district supervisor to review entire health center facility, and propose a firm plan for improvement. Then take this plan to higher officials for approval. Get community to agree to participate and to help get commitment of authorities
Equipment	Generally in poor condition New benches are needed for waiting area	Same	Request district supervisor to inventory all equipment Request repairs and replacement as needed Benches can be built by community

Form 5: PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

This form will help you conduct an inventory of primary health care facilities and equipment. The person in charge of the facility should accompany you as you inspect and inventory the facilities and equipment. Survey each building room-by-room. Assess the condition of each item using the following scale:

- 1 -- Excellent
- 2 -- Good
- 3 -- Fair
- 4 -- Poor
- 5 -- Needs repair before further use
- 6 -- Needs to be replaced

Whenever an item needs better maintenance or repair, obtain an estimate of how long it has been in its present condition.

Facility inspected <u>Alona Health Center</u>	Location <u>Alona District</u>
Person interviewed <u>R. Belata</u>	Title <u>Mid-level Health Worker</u> Location _____ Date <u>4 February 1983</u>
<input type="checkbox"/> Community <input type="checkbox"/> Health post <input type="checkbox"/> Population served	<input checked="" type="checkbox"/> Health center <input type="checkbox"/> District _____ Number of service contacts per month _____
Region _____ Other _____ Central Ministry of Health	
1. Who owns your facility? <p style="text-align: center;"><i>Ministry of health</i></p>	
2. Who originally provided your facility? <p style="text-align: center;"><i>Ministry of health</i></p>	
3. Who is responsible for facility maintenance and repair? <p style="text-align: center;"><i>We are not sure. There has been no real maintenance done for as long as we can remember. Whatever work is done, we do ourselves.</i></p>	

4. What are the main problems with the facility?

Generally, in very poor repair. Needs new roof, painting, and repairs to doors and windows.

5. Who provided your equipment?

Ministry of health

6. Who is responsible for equipment maintenance and repair?

Ministry of health

7. Do you have any problems with equipment maintenance and repair?

Very little is done by ministry of health. We try to do whatever we can by ourselves.

8. Do you have any additional comments?

Maintenance and repair of both buildings and equipment is very poor. There is no understanding of the responsibilities for this work by the health center staff, ministry of health, and Department of Public Works. There is also no community support. Community should be mobilized to assist with many needed improvements.

Inventory of Grounds, Facilities, and Equipment			
ITEM		ISSUES AND PROBLEMS	SUGGESTIONS FOR IMPROVEMENT
Description	Condition		
Access road from main road		Very poor condition deep ruts	Get community to help repair road
Fencing		None Animals wander around compound	Request fence wire from ministry of health get community to build fence
Demonstration garden		None	Health center staff, with assistance from agriculture extension workers and community health committee, to plant and maintain a garden
Buildings		Very poor condition	Request survey by Department of Public Works Prepare improvement plan Request in budget over 3-year period
Latrine		Very poor, overflowing should be abandoned	Get environmental officer to design new latrine get community to help install
Equipment		Some missing Others in poor repair	Get ministry of health district supervisor to inventory all equipment Prepare program to replace and repair equipment as needed

Form 5: PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

This form will help you conduct an inventory of primary health care facilities and equipment. The person in charge of the facility should accompany you as you inspect and inventory the facilities and equipment. Survey each building room-by-room. Assess the condition of each item using the following scale:

- 1 -- Excellent
- 2 -- Good
- 3 -- Fair
- 4 -- Poor
- 5 -- Needs repair before further use
- 6 -- Needs to be replaced

Whenever an item needs better maintenance or repair, obtain an estimate of how long it has been in its present condition.

Facility inspected <u>Kewena Health Center</u>		Location <u>Kewena District</u>	
Person interviewed <u>L. Versa</u>		Title <u>Mid-level Health Worker</u>	Date <u>5 June 1982</u>
<input type="checkbox"/> Community	<input checked="" type="checkbox"/> Health center	Region _____	Other _____
<input type="checkbox"/> Health post	<input type="checkbox"/> District	Central Ministry of Health	
Population served _____		Number of service contacts per month _____	
1. Who owns your facility? <i>Ministry of health</i>			
2. Who originally provided your facility? <i>Built and donated by community</i>			
3. Who is responsible for facility maintenance and repair? <i>Department of public works</i>			

4. What are the main problems with the facility?

Faulty foundations and inferior building materials. Building is sagging in northeast corner. Original materials not holding up well. Certain sections need rebuilding.

5. Who provided your equipment?

Ministry of health with UNICEF assistance

6. Who is responsible for equipment maintenance and repair?

Ministry of health, regional equipment workshop

7. Do you have any problems with equipment maintenance and repair?

Regional workshop lacks spare parts. Keeps equipment for months to make small repairs.

8. Do you have any additional comments?

Faulty foundations require major work; rebuilding of upper walls will be easier. This work could be done by the community if provided with: (a) good materials, and (b) technical supervision.

Inventory of Grounds, Facilities, and Equipment		ISSUES AND PROBLEMS	SUGGESTIONS FOR IMPROVEMENT
ITEM			
Description	Condition		
Grounds		In good condition Well-maintained by community labor	None
Access road		Same	None
Fencing		Maintained by community, just some new wire is needed	Request wire from ministry of health
Buildings		See page 1	See page 1
Latrine		In good condition	None
Roof catchment water supply		Catchment is fairly adequate Some sections of roof need replacement Holding tank should be cleaned more frequently	Repair roof with building renovation Set up schedule and procedure for tank cleaning by health center staff
Equipment			
Kerosene refrigerator	Not working	Needs to be replaced	Request district supervisor to inventory all equipment
Stove	OK, very dirty	Needs thorough cleaning	Request repairs and replacement as needed
Sterilizer	OK	No problem	
Scale	Inaccurate	Need to be calibrated and adjusted	
Sphygmomanometer	Worn	Should be replaced	

Form 5: PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

This form will help you conduct an inventory of primary health care facilities and equipment. The person in charge of the facility should accompany you as you inspect and inventory the facilities and equipment. Survey each building room-by-room. Assess the condition of each item using the following scale:

- 1 -- Excellent
- 2 -- Good
- 3 -- Fair
- 4 -- Poor
- 5 -- Needs repair before further use
- 6 -- Needs to be replaced

Whenever an item needs better maintenance or repair, obtain an estimate of how long it has been in its present condition.

Facility inspected <u>Bratta Health Center</u>		Location <u>Pronoko District</u>	
Person interviewed <u>S. Manrabo</u>		Title <u>Auxiliary Nurse</u>	Date <u>24 October 1982</u>
<input type="checkbox"/> Community	<input checked="" type="checkbox"/> Health center	<input type="checkbox"/> Region	<input type="checkbox"/> Other _____
<input type="checkbox"/> Health post	<input type="checkbox"/> District	<input type="checkbox"/> Central Ministry of Health	
Population served _____		Number of service contacts per month _____	
1. Who owns your facility? <i>Lutheran Church</i>			
2. Who originally provided your facility? <i>Lutheran Church</i>			
3. Who is responsible for facility maintenance and repair? <i>Shared by church, ministry of health and department of public works</i>			

4. What are the main problems with the facility?

No problems. The building is only two years old.

5. Who provided your equipment?

Lutheran Church

6. Who is responsible for equipment maintenance and repair?

Ministry of health

7. Do you have any problems with equipment maintenance and repair?

None yet, as equipment is new. However, some equipment is not ministry of health standard, and repairs and spare parts may be a problem in the future

8. Do you have any additional comments?

None

Inventory of Grounds, Facilities, and Equipment			
ITEM		ISSUES AND PROBLEMS	SUGGESTIONS FOR IMPROVEMENT
Description	Condition		
Grounds		Well planned and built, but difficult to maintain with limited health center staff	Additional help needed Obtain from community if possible
Buildings		None at present Preventive maintenance and repair schedule should be followed	Ask district supervisor to assist in drawing up schedule and instruct health center staff on its use
Flush toilets and plumbing system		Small problems developing Need preventive maintenance and repair schedule	Same
Equipment		In good repair They develop problems in future	Develop plan for repair and spare parts with ministry of health regional workshop

WORKSHEET FOR EXERCISE 14: Summarizing Information from Workbook Forms

Form 13: SUMMARY OF FORM 5--PRIMARY HEALTH CARE FACILITIES AND EQUIPMENT

<input type="checkbox"/> Community	<input type="checkbox"/> Health center	<input type="checkbox"/> Region	<input type="checkbox"/> Other _____
<input type="checkbox"/> Health post	<input type="checkbox"/> District	<input type="checkbox"/> Central Ministry of Health	

1. Who owns your facility?

2. Who originally provided your facility?

3. Who is responsible for facility maintenance and repair?

4. What are the main problems with the facility?

5. Who provided your equipment?

6. Who is responsible for equipment maintenance and repair?

7. Do you have any problems with equipment maintenance and repair?

8. Do you have any additional comments?

Inventory of Grounds, Facilities, and Equipment			
ITEM		ISSUES AND PROBLEMS	SUGGESTIONS FOR IMPROVEMENT
Description	Condition		

EXERCISE 15

Preparing Findings and Conclusions

SITUATION

Your instructor will return to you your revised Worksheet for Exercise 14. You will prepare findings and conclusions based on the information on this worksheet.

YOUR ASSIGNMENT

STEP 1

Review your revised Worksheet for Exercise 14. Prepare and record a list of findings and conclusions using the Worksheet for Exercise 15. This is a copy of Form 18, Summary of Findings and Conclusions, from the Facilities and Equipment Maintenance System Workbook.

STEP 2

Meet in small groups. Exchange your completed worksheet with another student. He will correct your list of findings and conclusions as your group compares and discusses the list.

STEP 3

Rewrite your list of findings and conclusions.

STEP 4

Give your revised worksheet to the instructor for review and evaluation.

WORKSHEET FOR EXERCISE 15: Preparing Findings and Conclusions

Form 18: SUMMARY OF FINDINGS AND CONCLUSIONS

Use this form to describe the issues and problems that you have identified in your study. Summarize each issue or problem in the "Findings" column. Assign each conclusion a reference number to link it to the alternative recommendations to be described in Form 22.

<input type="checkbox"/> Community	<input type="checkbox"/> Health center	<input type="checkbox"/> Region	<input type="checkbox"/> Other _____
<input type="checkbox"/> Health post	<input type="checkbox"/> District	<input type="checkbox"/> Central Ministry of Health	

FINDINGS	CONCLUSIONS	REFERENCE NUMBER

EXERCISE 16

Identifying Alternative Recommendations

SITUATION

Your instructor will return to you the worksheet you revised in Exercise 15. You will use this worksheet to identify alternative recommendations.

YOUR ASSIGNMENT

STEP 1

Review your revised Worksheet for Exercise 15.

STEP 2

Identify and describe all of the possible solutions you can think of for each of the problems described on the worksheet.

STEP 3

The Worksheet for Exercise 16 is a copy of the Alternative Recommendations form from the management system workbook. Complete the Worksheet for Exercise 16. Rank your recommendations according to priority, with number 1 the highest priority. Justify each recommendation.

STEP 4

Give your completed worksheet to your instructor for review and evaluation. Take part in a class discussion of the exercise.

WORKSHEET FOR EXERCISE 16: Identifying Alternative Recommendations

Form 22: ALTERNATIVE RECOMMENDATIONS FOR CONCLUSION _____

Complete one copy of this form for each study conclusion that you described on Form 18. For each conclusion develop a minimum of two alternative recommendations, with accompanying justification statements. Rank the recommendations according to priority, with the most desirable listed first. Use as many extra pages as you need. You will submit these recommendations to others in the group decision-making process for management systems improvement.

RECOMMENDATIONS	JUSTIFICATIONS
1.	
2.	
3.	

EXERCISE 17

Identifying Alternative Recommendations through Brainstorming

SITUATION

You will use the Worksheet for Exercise 15 and the Worksheet for Exercise 16 during this brainstorming exercise.

YOUR ASSIGNMENT

STEP 1

Review the Worksheet for Exercise 15 and the Worksheet for Exercise 16.

STEP 2

Meet in small groups. Each student will report his findings and conclusions to the group. The group will select two or three problems from those presented.

STEP 3

Spend about fifteen to thirty minutes in your group brainstorming solutions for each of the selected problems. All possible ideas and suggestions should be recorded. Follow the Brainstorming Guidelines for Exercise 17.

STEP 4

In your group, review, discuss, and select the best three recommendations. Rank them according to priority. Then each member of the group completes the Worksheet for Exercise 17.

STEP 5

Report to your group on the differences between the Worksheet for Exercise 16 and the Worksheet for Exercise 17. This will demonstrate the value of brainstorming.

STEP 6

Give your worksheets to the instructor. Take part in a class discussion of the exercise.

Brainstorming Guidelines for Exercise 17

1. Meet with a group of five to twelve people. Post large sheets of paper on the wall, or use a chalkboard to record ideas.
2. Clearly define the problem for which you are seeking solutions. Write the problem on the paper or chalkboard.
3. Explain the rules of brainstorming. Emphasize that the objective is to list as many ideas as possible. No idea is too absurd or silly. Every idea counts. Encourage participants to adapt or expand on earlier ideas.
4. As ideas are expressed by the participants, write them on the paper or chalkboard as fast as possible in short, concise statements. Number them consecutively, so the participants can see at all times how many ideas they have generated. The following are the types of ideas that might be suggested to solve the problem of excessive waiting time at an outpatient clinic:
 - Add more staff
 - Add staff on market days
 - Schedule more frequent clinics
 - Start earlier in the morning
 - Eliminate history taking
 - Take histories during examinations
 - Pre-package drugs for dispensing
 - Dispense the most common drugs during examination and treatment
 - Shorten the registration form
 - Use mid-level health workers in place of doctors
5. Urge the participants to produce more and more ideas. Set goals. For example say, "Fine, we now have eleven ideas, but surely there are many more. Let us set a goal to reach twenty-five in the next ten minutes." Then, write the numbers 12 through 25 on the board. Leave space to add ideas as they are expressed.
6. Allow no criticism or evaluation of ideas during the session.

7. Keep the session short, no longer than thirty to forty-five minutes. Thank the participants at the end of the session. Advise them that they will receive a typed list of the ideas and should evaluate them during the following day. At the same time they can add to their copy any additional ideas that may have occurred to them following the session.
8. Type the ideas and circulate them to the participants for review and evaluation. Leave space for them to add comments and additional ideas. Include a column for ranking them in order of feasibility and value.

WORKSHEET FOR EXERCISE 17: Identifying Alternative Recommendations through Brainstorming

Form 22: ALTERNATIVE RECOMMENDATIONS FOR CONCLUSION _____

Complete one copy of this form for each study conclusion that you described on Form 18. For each conclusion develop a minimum of two alternative recommendations, with accompanying justification statements. Rank the recommendations according to priority, with the most desirable listed first. Use as many extra pages as you need. You will submit these recommendations to others in the group decision-making process for management systems improvement.

RECOMMENDATIONS	JUSTIFICATIONS
1.	
2.	
3.	

EXERCISE 18

Analyzing Problems and Finding Solutions

SITUATION

You are a management analyst assigned to gather information on the health information system. You have found serious problems at the district level and below. Health workers in the health centers have complained about the amount of time and effort they spend filling out forms. They say that they never see any results from their work. Officials at the district level, the district medical officer, and the district public health nurse have all complained that they have insufficient and inaccurate information with which to plan their programs. They, in turn, have been pressured by regional and central level officials to get their reports in on time, even though they know the reports are incomplete and based on inaccurate reporting.

With this and other information gathered through your interviews, document research, and observations, you will now conduct a problem-solving analysis using the three worksheets provided. Worksheet A is a copy of the Statement of Problem and Root Causes form. Worksheet B is a copy of the Analysis of Forces Affecting Change form. Worksheet C is a copy of the Alternative Problem-Solving Approaches form.

YOUR ASSIGNMENT

STEP 1

Take part in a class discussion of the case history. Using Worksheet A for Exercise 18, state the problem and identify the root causes. Refer to Unit 3 for instructions for filling out the form.

STEP 2

Exchange completed worksheets with another student. Review the other student's worksheet. Compare your worksheets and make notes on how each can be improved.

STEP 3

List on Worksheet B for Exercise 18 those forces that are hindering a solution to the problem and those that are helping toward a solution.

STEP 4

Again, exchange worksheets with another student. Review and compare the worksheets, and make notes on how each can be improved.

STEP 5

On Worksheet C, list at least three alternative approaches or strategies for solving the problem. Describe the advantages and disadvantages of each. Be specific. Use quantitative statements whenever possible. For example, under "advantages," write that an approach "will increase the accuracy of health information by thirty percent," or "will reduce time in filling out forms from one hour per day to thirty minutes per day for the average health center." For "disadvantages," write that an approach "will require three additional clerks for each district," or "will add two additional forms to be filled out at the district level."

STEP 6

Exchange worksheets with another student. Review and compare the worksheets and make notes on how each can be improved.

STEP 7

Take part in a class discussion on this exercise. Make further notes and corrections on your worksheets.

STEP 8

Give your set of three worksheets to the instructor for review and evaluation.

WORKSHEET A FOR EXERCISE 18: Analyzing Problems and Finding Solutions

Form 19: STATEMENT OF PROBLEM AND ROOT CAUSES

This is the first of three forms used in the step-by-step problem-solving approach to analyzing and developing solutions to management problems. Use this form to state each problem that you identify and its root causes. The completed form will be the basis for further analysis.

STATEMENT OF THE PROBLEM

What is the problem?

When and how often does it occur?

How does the problem affect health management?

How severe is the impact?

Where does the problem occur?

Who is affected by the problem?

Who is responsible for the work activity where the problem occurs?

ROOT CAUSE(S) OF THE PROBLEM

1.

2.

3.

WORKSHEET B FOR EXERCISE 18: Analyzing Problems and Finding Solutions

Form 20: ANALYSIS OF FORCES AFFECTING CHANGE

This is the second form in the problem-solving approach to solving management problems. Use this form to identify factors that either constrain actions toward reaching a solution or help in reaching a solution. The completed form will be the basis for further analysis.

CONSTRAINING FORCES	HELPING FORCES

WORKSHEET C FOR EXERCISE 18: Analyzing Problems and Finding Solutions

Form 41: ALTERNATIVE PROBLEM-SOLVING APPROACHES

This is the third of three forms in the problem-solving approach to solving management problems. Use this form to identify and examine alternative approaches to solving the problems that you have identified. This completed form becomes a reference for developing your final recommendations.

APPROACH	ADVANTAGES	DISADVANTAGES

EXERCISE 19

Describing Management Study Methods

SITUATION

You have now been introduced to the various methods that you will use to conduct a study of a selected management system. This exercise gives you an opportunity to describe the methods you actually plan to use.

YOUR ASSIGNMENT

STEP 1

Review the Student Text, your notes, and your worksheets to remind yourself of all the things you have learned about how to conduct a management study.

STEP 2

Review the introductory section of your system workbook. The introductory section contains the Description of Study Methods form. The Worksheet for Exercise 19 is a copy of this form.

STEP 3

Complete the Worksheet for Exercise 19.

STEP 4

Give your completed worksheet to the instructor. Take part in a class discussion about the exercise.

STEP 5

Rewrite your worksheet on the basis of the class discussion. Use the Description of Study Methods form in your management system workbook.

WORKSHEET FOR EXERCISE 19: Describing Management Study Methods

Description of Study Methods

Information will be gathered by the following methods:

The information gathered will be validated by the following methods:

Findings and conclusions will be formulated by the following methods:

Alternative recommendations will be formulated by the following methods:

Unit 4

Preparing a Written Report of a Management Analysis Study

STUDENT GUIDE

OBJECTIVE

Write a report of management study findings, conclusions, and recommendations.

LEARNING ACTIVITIES

1. Read Unit 4 in the Student Text and answer the review questions.
2. Take part in a class discussion of the review questions.
3. Prepare a proposed outline for a management study report.
4. Review and critique an existing management study report.
5. Write a letter of transmittal to accompany the management study report that you reviewed.

4.1 PURPOSE OF A WRITTEN REPORT

A written report of findings, conclusions, and recommendations is the end product of your management analysis study. A report of a management analysis study describes the system that you have studied and presents your recommendations for change. The report will serve as the basis for decisions on how the system should be improved. The report is a permanent record that can be used as a reference by different people at different times. Senior level officials will read the report. You must therefore take special care in writing it.

In writing the report, give special attention to:

- Understanding who will read and use the report
- Presenting information as objectively as possible
- Using a writing style, format, and tone that generate interest rather than boredom
- Using words that are specific and commonly used, while avoiding technical words and jargon

4.2 CONTENT AND FORMAT OF A WRITTEN REPORT

Whenever possible, you should use a standard format for written reports. This will make it easier for you to prepare the report and also easier for the readers to understand the content of the report. Your report should include the following elements.

Letter of Transmittal

A letter of transmittal explains why the report was prepared, who authorized it, and who will use it. A letter of transmittal is usually only a few paragraphs and never more than one page.

Title Page

A title page gives:

The title of the report

Your name and position

The department, agency, or organization under whose sponsorship you conducted the study

The date the report was prepared
Whether the report is a draft or a final report.

Table of Contents

The table of contents lists the main headings and sub-headings of the report by page number. It also usually includes a listing of tables, charts, illustrations, and appendices.

Summary

This is a summary of the findings, conclusions, and recommendations contained in the report. A summary should give the reader a good overview of the results of the study in about five to ten minutes of reading.

Introduction

The introduction is the first section of the report. It includes the purpose of the study and a description of the management systems improvement process of which the study is a major first step. It should also describe the management support system under study and explain how the system fits into the overall primary health care development effort.

Study Findings, Conclusions, and Recommendations

The findings and conclusions are a step-by-step description of the system studied. They should be presented in the order in which events occur in the daily operation of the system. Recommendations, usually in the form of suggested alternative solutions, should appear at the end of each section of the findings and conclusions to which they relate.

Appendices

The first appendix should be a narrative description of your study methodology. This will be a summary of the Description of Study Methods form in your management system workbook. The second appendix should be a bibliography of the key records and written materials that you used in conducting the study and preparing the report. This will be a summary of the List of Documents Reviewed form in your management system workbook. The third appendix should be the list of persons that you contacted during the process of conducting the study, including their job titles and place of work. This will be a summary of the List of Persons Interviewed form in your management system workbook.

You may add additional appendices as needed. These would include information that is helpful in understanding the report but not appropriate to include in the main report because of content or length.

REVIEW QUESTIONS
**Preparing a Written Report of a
Management Analysis Study**

1. What is the purpose of a written report of a management analysis study?

2. What are the things you should pay special attention to in preparing a written report?

3. Outline the seven elements of the suggested report format in the order in which they should appear in the report.

4. TRUE (T) or FALSE (F)
 - _____ Preparing a written report is one of the management analyst's most important functions.
 - _____ The written report stands alone and does not serve as the basis for further analysis.
 - _____ The written report provides a common focus for people of different perspectives.
 - _____ The letter of transmittal does not refer to the intended use of the report.
 - _____ The appendix is a summary of the findings and recommendations contained in the report.
 - _____ It is always a good idea to use a standardized format for written reports.

EXERCISE 20

Preparing an Outline of a Written Report

SITUATION

After completing a management analysis study, you will be required to prepare a formal written report. Now that you know what should be contained in a formal written report, you will prepare an outline for the report you will write on the management system you have been assigned to study.

YOUR ASSIGNMENT

STEP 1

Review Unit 4 and your management system workbook to identify information that you need to cover in a study report.

STEP 2

Write an outline of the report. Begin with the title page, and end with the appendices.

STEP 3

Give your outline to your instructor for review. Take part in a class discussion of the outlines.

STEP 4

The instructor will return your outline. Revise the outline according to what you have learned from his comments and the class discussion.

STEP 5

Give your revised outline to the instructor for review and evaluation.

EXERCISE 21
**Reviewing a Written Report of a
Management Analysis Study**

SITUATION

Your instructor will give you a copy of a report of a management analysis study. You are to review and critique this report based on what you have learned about conducting management analysis studies and recording the study results in a report.

YOUR ASSIGNMENT

STEP 1

Read the report carefully. Identify key issues and other important considerations, including any major gaps in information. Take notes. Review the report as many times as necessary to make sure that you have not missed important information and that you fully understand the content.

STEP 2

Write a critique of the report.

STEP 3

Present your critique orally to the class. Lead the class in a discussion of your critique.

STEP 4

Rewrite your critique based on the class discussion.

STEP 5

Give your written critique to the instructor for review and evaluation.

EXERCISE 22

Preparing a Letter of Transmittal for a Written Report

SITUATION

In distributing reports of management analysis studies for review by others, a formal letter of transmittal is usually required. Assume that you wish to distribute the report from the previous exercise. Prepare a letter of transmittal.

YOUR ASSIGNMENT

STEP 1

Identify to whom the letter of transmittal should be addressed and who the appropriate signing official should be.

STEP 2

Write the letter of transmittal to accompany the report that you reviewed in Exercise 21.

STEP 3

Exchange your letter of transmittal with another student.

STEP 4

Take part in a class discussion about the letters. Evaluate the other student's letter and return it to him.

STEP 5

Rewrite the letter of transmittal, based on the other student's evaluation and the class discussion.

STEP 6

Give your rewritten letter of transmittal to your instructor for review and evaluation.

Unit 5

Preparing and Presenting an Oral Report of a Management Analysis Study

STUDENT GUIDE

OBJECTIVES

1. Prepare an oral report of management study findings, conclusions, and recommendations.
2. Prepare an oral report with and without visual aids.
3. Prepare visual aids to illustrate key points in an oral report.

LEARNING ACTIVITIES

1. Read Unit 5 in the Student Text and answer the review questions.
2. Take part in a class discussion of the review questions.
3. Prepare, rehearse, and present an oral report without visual aids.
4. Prepare, rehearse, and present an oral report with visual aids.

5.1 PURPOSE OF AN ORAL REPORT

You will often be asked to give a brief oral summary of your written report to senior level officials in the health care system. An effective oral report can interest senior level officials in implementing the changes recommended in the written report. You may also be asked to make an oral report at the district or national planning and management workshop organized to review and make recommendations based on your written report.

Regardless of the audience, the purpose of an oral report is to:

- Transfer essential information to listeners
- Persuade listeners of the worth of what you are saying

5.2 PREPARING AN ORAL REPORT

To prepare an oral report, you need to know:

- How much time you will have to make your presentation and to answer questions
- Who the listeners will be and what their interests and biases are
- What the specific purpose of the oral report is in addition to the standard purposes listed above

The oral report should cover the main points made in the written report. The amount of detail will depend on the time constraints and audience involved. You should structure the report to capture and hold your audience's attention.

Outline your talk and think carefully about what you want to say. Present your ideas in the best, most convincing way. You are trying to "sell" your ideas, so make them sound as attractive as possible. A valuable technique is the use of the summary. Summarize your ideas at the conclusion of your presentation. Also use the summary technique to pull together and focus any discussion of your presentation. A summary adds emphasis where desired and keeps the audience focused on key issues.

If you plan to conclude your presentation with a question and answer session, be sure to prepare in advance. Identify possible questions and decide how you will answer them.

5.3 USING VISUAL AIDS

Visual aids, such as charts, slides, or pictures, can enhance your presentation. An effective visual aid can make a lasting impression in the minds of your audience. However, visual aids can confuse and distract your audience if they are not used correctly. Visual aids are not simply words printed for everyone to see. They must summarize information or present concepts that are better understood when they are seen graphically. Charts and graphs in the written report can often be used as visual aids in the oral report.

Your choice of visual aids will depend on the type of equipment available and the message you wish to get across to the audience. Commonly used visual aids include flipcharts, chalkboard, transparencies projected by an overhead projector, 35 mm slides, and handouts.

5.4 REHEARSING AN ORAL REPORT

You should rehearse your presentation enough times to present it using only brief notes. You should avoid reading from the written report or a written summary of the report. When you speak from brief notes:

- You are more believable and convincing

- Your presentation affords better contact with your listeners

- You can be flexible and adapt your words and ideas to the occasion

- You will be forced to think about your subject as you are speaking

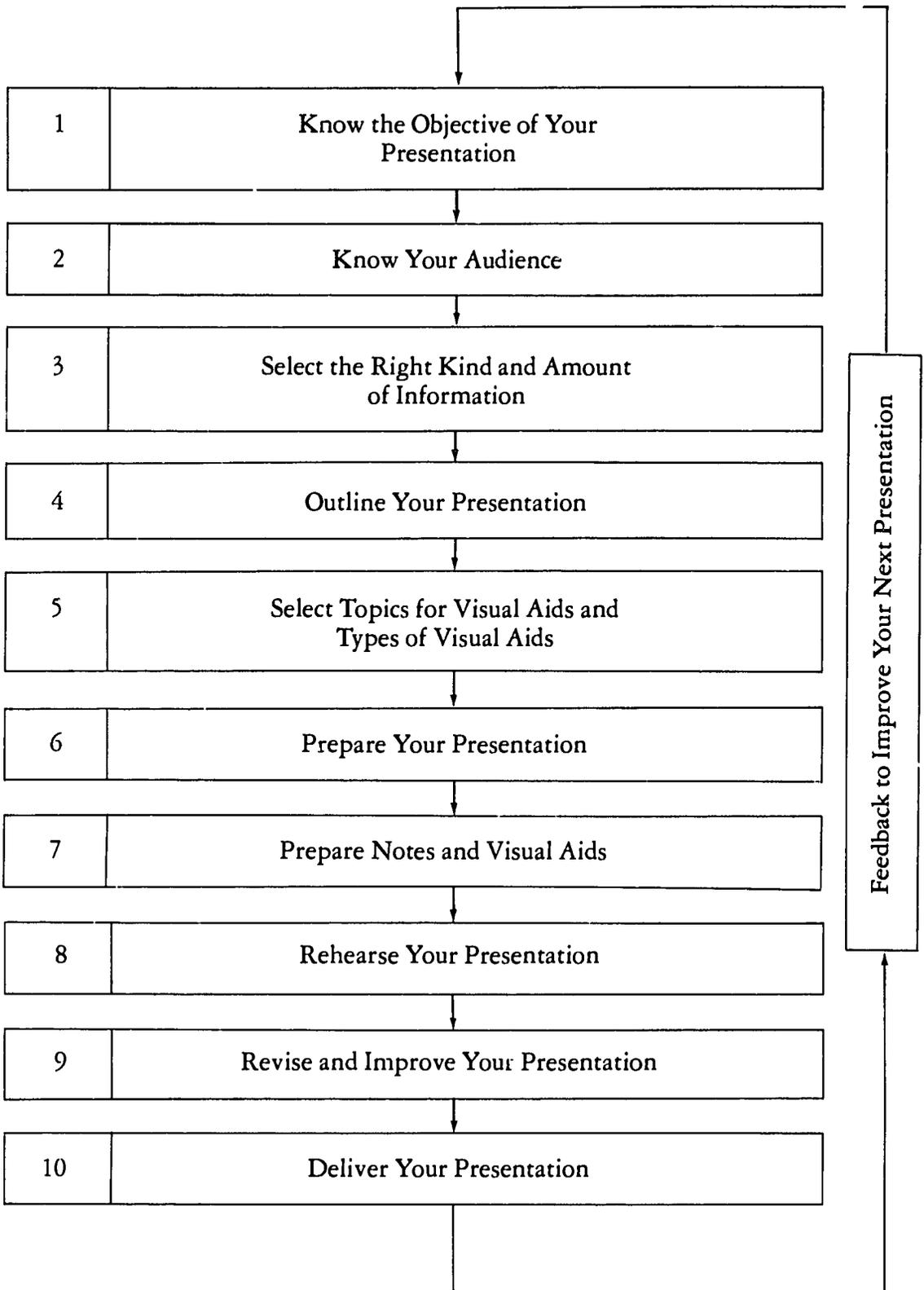
Rehearse your presentation in the place where you will speak. Then you can become familiar with the room, the location of electrical outlets and lights, and the position of your visual aid equipment. Ask a friend or colleague to listen to and critique your presentation. The suggestions of a friendly critic can help you improve your presentation significantly.

5.5 PRESENTING AN ORAL REPORT

As you deliver your presentation remember your objectives and be aware of your audience's feelings, attitudes, and reactions. Be yourself. Maintain eye contact throughout your presentation. Look directly into the eyes of individuals in the audience. This will tell you whether your audience is looking and listening. If they are not, it tends to make them look and listen. Remember that you are in control, regardless of who is in your audience. This does not mean that you become a dictator, but it does mean that you are not afraid to end a question and answer session, wait for a late arrival to be seated, or stop until you gain lost attention.

Follow the ten steps outlined on the chart below to prepare and present an effective oral report.

The Ten Steps to Presenting an Effective Oral Report



REVIEW QUESTIONS
Preparing and Presenting an Oral Report
of a Management Analysis Study

1. Describe the circumstances in which you may be called upon to make an oral report.

2. Explain the two purposes of an oral report.

3. You want to prepare an effective oral report about your recent study of the communication system. What do you need to know to prepare this report?

4. Name at least three types of visual aids that may be used for an oral report.

5. Why should you rehearse your oral report?

6. TRUE (T) or FALSE (F)
 - ___ You should memorize your oral report.
 - ___ One purpose of an oral report is to persuade listeners of the worth of what you are saying or advocating.
 - ___ The chalkboard is not an effective visual aid and should be avoided.
 - ___ If you know your material, rehearsal is seldom necessary.
 - ___ Question and answer sessions are an effective way to conclude your presentation.

EXERCISE 23

Presenting an Oral Report without Visual Aids

SITUATION

You have been given a written report of a management analysis study. You have been requested by the permanent secretary to make a presentation on the report's findings, conclusions, and recommendations. You will make the presentation in a role-play situation to a group of senior level health officials at a national workshop.

YOUR ASSIGNMENT

STEP 1

Using the management report given to you by your instructor and following his instructions, prepare an outline of key points to cover in your presentation.

STEP 2

Outline the key points in a logical sequence. Plan your introduction and closing remarks.

STEP 3

Privately rehearse and time your presentation.

STEP 4

Rehearse your presentation in front of someone who will critique it, using the Worksheet for Exercise 23 as a guide.

STEP 5

Revise the presentation based on the observer's evaluation. Privately rehearse your revised presentation.

STEP 6

The instructor will organize the class into a role-play situation and select an observer. Present your report to the role-play group while the observer critiques the presentation using the Worksheet for Exercise 23 as a guide.

STEP 7

The observers report to the class and lead a discussion of each presentation.

WORKSHEET FOR EXERCISE 23

Presenting an Oral Report without Visual Aids

Presenter _____ Observer _____	YES	NO	COMMENTS
Does the introduction get your attention?			
Does the introduction say what the talk will include?			
Does the introduction relate the talk to the interests of the audience?			
Is the speaker enthusiastic and sincere?			
Does the speaker seem natural?			
Does the talk have a clear central theme?			
Is the speaker's language and pronunciation appropriate?			
Is the speaker poised and relaxed?			
Is the speaker's voice clear and loud enough?			
Does the speaker use relevant gestures and actions?			
Does the speaker keep good audience eye contact?			
Does the speaker use the microphone properly?			
Does the speaker display a full grasp of his subject?			
Does the conclusion tie the presentation together?			
Does the conclusion relate back to the central theme?			

EXERCISE 24

Presenting an Oral Report with Visual Aids

SITUATION

The situation is identical to the previous exercise, except that you have an opportunity to revise your presentation on the basis of the observer's rating and the appropriate use of visual aids.

YOUR ASSIGNMENT

STEP 1

Review the critique of your oral presentation in Exercise 23. Revise your presentation and outline notes accordingly.

STEP 2

Review your revised oral presentation. Identify ways to enhance the presentation with visual aids. Prepare a new outline that includes visual aid references.

STEP 3

Select the most appropriate visual aids to use. Prepare the visual aids.

STEP 4

Privately rehearse and time your presentation.

STEP 5

Present your report to the group. An observer will record his critique of the presentation on the Worksheet for Exercise 24.

STEP 6

The observer will report to the group and lead a discussion of the presentation.

WORKSHEET FOR EXERCISE 24

Presenting an Oral Report with Visual Aids

Presenter _____ Observer _____	YES	NO	COMMENTS
Does the introduction get your attention?			
Does the introduction say what the talk will include?			
Does the introduction relate the talk to the interests of the audience?			
Is the speaker enthusiastic and sincere?			
Does the speaker seem natural?			
Does the talk have a clear central theme?			
Is the speaker's language and pronunciation appropriate?			
Is the speaker poised and relaxed?			
Is the speaker's voice clear and loud enough?			
Does the speaker use relevant gestures and actions?			
Does the speaker keep good audience eye contact?			
Does the speaker use the microphone properly?			
Does the speaker display a full grasp of his subject?			
Are the visual aids used appropriate for the subject and the audience?			
Are the visual aids easy to read and understand?			
Do the visual aids clearly support the points being made?			
Does the conclusion tie the presentation together?			
Does the conclusion relate back to the central theme?			

**MANAGEMENT ANALYSIS TRAINING
MODULE**

The MEDEX Primary Health Care Series

**MANAGEMENT
ANALYSIS TRAINING
MODULE**

Instructor's Manual

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Health Manpower Development Staff
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SCHEDULE
MANAGEMENT ANALYSIS TRAINING MODULE

DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
Pretest Teaching Plan 1: Explaining Management Analysis and the Management Systems Improvement Process	Teaching Plan 2: Adapting a Prototype Management System Workbook	Teaching Plan 3: Identifying and Reviewing Written Documents for a Management Analysis Study	Teaching Plan 4: Gathering Information through Observation	Teaching Plan 5: Gathering Information through Interviews
	Teaching Plan 3: Identifying and Reviewing Written Documents for a Management Analysis Study		Teaching Plan 5: Gathering Information through Interviews	Teaching Plan 6: Conducting a Work Flow Analysis
Teaching Plan 2: Adapting a Prototype Management System Workbook		Teaching Plan 4: Gathering Information through Observation		

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DAY 6	DAY 7	DAY 8	DAY 9	DAY 10
Teaching Plan 6: Conducting a Work Flow Analysis	Teaching Plan 6: Conducting a Work Flow Analysis	Teaching Plan 7: Summarizing and Analyzing Information for a Management Analysis Study	Teaching Plan 7: Summarizing and Analyzing Information for a Management Analysis Study	Teaching Plan 8: Preparing a Written Report of a Management Analysis Study
Teaching Plan 6: Conducting a Work Flow Analysis	Teaching Plan 7: Summarizing and Analyzing Information for a Management Analysis Study	Teaching Plan 7: Summarizing and Analyzing Information for a Management Analysis Study	Teaching Plan 8: Preparing a Written Report of a Management Analysis Study	Teaching Plan 9: Preparing and Presenting an Oral Report of a Management Analysis Study

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DAY 11	DAY 12			
Teaching Plan 9: Preparing and Presenting an Oral Report of a Management Analysis Study	Teaching Plan 9: Preparing and Presenting an Oral Report of a Management Analysis Study			
Teaching Plan 9: Preparing and Presenting an Oral Report of a Management Analysis Study	Posttest			

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Teaching Plan 1

Explaining Management Analysis and the Management Systems Improvement Process

OBJECTIVE	Explain management analysis and the management systems improvement process.
METHODS	Self-instruction, role-play, class discussion
MATERIALS	Student Text—Unit 1, Worksheet for Exercise 1

TIME: 3 hrs 30 min

LEARNING ACTIVITIES

- | | |
|---|-------------|
| 1. Have the students read Unit 1 in the Student Text and answer the review questions. | 1 hr |
| 2. Lead a class discussion of the review questions. | 30 min |
| 3. Have the students review the instructions for Exercise 1 in the Student Text. Assign roles for the role-play. | 15 min |
| 4. Have the students make their role-play presentations to explain the management analysis approach. Repeat the role-play exercise as many times as necessary to allow each member of the group to play the roles of Mr. Wright and the observer. During the role-plays, the person assigned to be the observer will complete the Worksheet for Exercise 1. | 1 hr 15 min |
| 5. Collect the completed worksheets and present the results to the class. Lead a class discussion about the exercise. Ask questions such as, "Now that you have observed everyone playing the role of Mr. Wright, how would you respond to the chief pharmacist?" | 30 min |

ANSWERS TO REVIEW QUESTIONS
Management Analysis and the
Management Systems Improvement Process

1. What is management development?

Management development is a long-range, step-by-step process for improving an organization's management performance. Management development is concerned with training workers to improve their management skills and improving the systems within which they work.

2. List the eight basic management systems needed to support primary health care services.

- a. Drugs and medical supplies*
- b. General supplies*
- c. Facilities and equipment maintenance*
- d. Transportation*
- e. Communication*
- f. Personnel*
- g. Finance*
- h. Health information*

3. Management analysis is a new concept to many people. You have been asked to explain it to a group of health officials. What would you tell them?

Management analysis is the study of the causes of and alternative solutions to management problems.

4. You have been assigned to study a health program's communication system. What steps would you take to accomplish this task?

- a. Review background information*
- b. Develop a plan for conducting the study*
- c. Gather information*
- d. Summarize and analyze the information*
- e. Identify possible solutions to problems identified*
- f. Prepare a written report of findings, conclusions, and recommendations*

- g. Present an oral report of findings, conclusions, and recommendations*
- b. Help implement changes*

5. Describe in the correct sequence the five steps in the management systems improvement process. Indicate in which steps you, as a management analyst, will be directly involved.

- a. Preparation: This involves orienting and training the people who will be involved in the system improvement effort. It also involves obtaining the official approvals to proceed with a system improvement effort. The analyst would not usually be involved here, except to be trained.*
- b. Management analysis: This involves conducting a thorough study of the system by a management analyst. The management analyst also prepares and presents reports from the study.*
- c. Decision-making: This involves a group review and revision of study findings, conclusions, and recommendations, and the preparation of workshop reports and other papers requesting and justifying system improvement actions. The analyst would be involved as an advisor and would assist with the writing of reports and related papers.*
- d. Implementation: This involves preparing and distributing new policies and procedures, revising training materials, and conducting orientation and training for people affected by changes. The analyst could be asked to help write down the new policies, procedures, and training materials.*
- e. Evaluation and systems renewal: This involves assessing the performance of the system on a continuing basis and repeating all or part of the development phases described above whenever major improvements are necessary. The analyst might be asked to assist with any of these activities.*

6. What is the purpose of a management system workbook?

A management system workbook provides step-by-step guidelines for planning and conducting a study of a management support system.

7. What is the difference between random and representative sampling?

In a random sample, each element has an equal probability of occurring. In a representative sample, each element represents different, often diverse characteristics.

8. TRUE (T) or FALSE (F)

T A management system workbook provides a systematic approach for planning and conducting a management analysis study.

F The prototype workbooks are complete and require no adaptation.

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Teaching Plan 2

Adapting a Prototype Management System Workbook

OBJECTIVES	<ol style="list-style-type: none">1. Adapt a prototype management system workbook to reflect local language and usage.2. Select a representative sample of people to be interviewed for a management analysis study.3. Determine the type and number of forms needed to carry out a management analysis study.
METHODS	Self-instruction, class discussion
MATERIALS	Student Text—Unit 1, prototype management system workbooks, extra workbook forms, Worksheet for Exercise 2, Worksheet for Exercise 3
PREPARATION	Compile a list containing the names and addresses of all rural health posts and health centers, all district, regional, and central health officials, and all other offices and officials who are directly or indirectly related to the various management systems to be studied by the students.

TIME: 6 hrs

LEARNING ACTIVITIES

<ol style="list-style-type: none">1. Have the students review the instructions for Exercise 2 in the Student Text. Be sure the students read their entire management system workbook one or more times prior to this class. Have the students complete the Worksheet for Exercise 2. They should write on the worksheet the words or phrases they think need to be changed to reflect local language usage.	1 hr
<ol style="list-style-type: none">2. Lead a class discussion of the changes proposed by the students. Ask individual students to report to the class.	30 min
<ol style="list-style-type: none">3. Upon reaching general agreement on the changes, have the students write the changes in their workbooks.	30 min

	TIME
Collect the revised workbooks and worksheets for review and evaluation.	
4. Have the students review the instructions for Exercise 3 in the Student Text. Distribute a list containing the names and addresses of all rural health posts and health centers, all district, regional, and central health officials, and all other offices and officials who are directly or indirectly related to the various management systems to be studied by the students. Have the students complete the Worksheet for Exercise 3. Have the students exchange their completed worksheets.	1 hr
5. Lead a class discussion of the representative sampling approach. Review the difference between random and representative sampling.	30 min
6. Ask the students to prepare a new Worksheet for Exercise 3 using the knowledge they gained from their first attempt. Collect the completed worksheets for review and evaluation.	30 min
7. Return the worksheets to the student with your recommendations for changes. Have the students record the corrected list on Form 1 of their management system workbooks, List of Persons Interviewed.	30 min
8. Have the students review the instructions for Exercise 4 in the Student Text. Be sure that each student has an adequate number of workbook forms to complete a management study. Have the students refer to the Ordering List for Workbook Forms in their workbooks. They should cross out with pen or pencil any form they do not intend to use. Since every form provided in the workbook is considered essential for a complete system study, be sure they have a good reason for omitting any form.	30 min
9. Based on the information in Form 1, List of Persons Interviewed, and the instructions for the use of each form, have the students calculate the number of forms they will need to complete their study. They should write the number of each form needed on the Ordering List for Workbook Forms.	30 min

	TIME
10. Collect the Ordering List for Workbook Forms from each student. Obtain the correct number of forms and distribute them to the students. Have the students count the forms to make sure they have the correct number of copies. Then tell the students to insert the forms into their management system workbooks in the appropriate places.	30 min

Teaching Plan 3

Identifying and Reviewing Written Documents for a Management Analysis Study

OBJECTIVE	Obtain and review records, reports, and other documents for a management analysis study.
METHODS	Self-instruction, class discussion
MATERIALS	Student Text—Unit 2, management study report, Worksheet for Exercise 5, Worksheet for Exercise 6
PREPARATION	Contact the information sources described in Exercise 5 in the Student Text. Obtain permission for your students to visit these offices and libraries. Obtain and make copies of a management study report on a problem area or system.

TIME: 6 hrs 30 min

LEARNING ACTIVITIES

- | | |
|---|--------|
| 1. Have the students read Unit 2 in the Student Text and answer the review questions. | 1 hr |
| 2. Lead a class discussion of the review questions. | 30 min |
| 3. Have the students review the instructions for Exercise 5 in the Student Text. Have them visit offices and libraries to search for records that relate to the management system they are studying. Have them complete the Worksheet for Exercise 5. | 3 hrs |
| 4. Reassemble the class and ask the students to submit their completed worksheets. | 30 min |
- Lead a class discussion of the exercise. Ask these questions:
- “What was easy and what was difficult about gathering information from the sources you chose?”
- “What would you do differently next time?”

	TIME
<p>"If you were advising a new management analyst about how to gather written information, what would your advice be?"</p> <p>Review the worksheets and then return them to the students for their future reference.</p>	
5. Have the students review the instructions for Exercise 6 in the Student Text. Distribute copies of the management report. Have the students evaluate the report using the Worksheet for Exercise 6.	1 hr
6. Lead a class discussion of the exercise. Collect the worksheets for review and evaluation.	30 min

ANSWERS TO REVIEW QUESTIONS

Gathering Information for a Management Analysis Study

1. What are the three basic sources of information for a management analysis study?

- a. Records, reports, and other written documents*
- b. Direct observation of events and conditions*
- c. The memories and insights of other people*

2. What kinds of information can you obtain through observation?

- a. Physical condition of a facility*
- b. Conditions in a work place*
- c. Working condition of equipment*
- d. The pace and nature of people's work*
- e. The sequence and flow of activities*
- f. Procedures for recording, filing, and retrieving information*
- g. Dress, behavior, and interpersonal relations of personnel*
- h. Outwardly expressed attitudes of patients, workers, and supervisors*

3. Who should you interview?

You should interview people from different organizational levels and geographical locations and with different points of view. This is called a representative sample.

4. Why should you interview people at their place of work?

Generally, people are more relaxed and communicative in familiar surroundings.

5. What are the advantages of seeing someone to be interviewed before the interview actually takes place?

To explain the purpose of the interview, provide the person with written authorization from a senior health official, obtain background records and reports, and set a time in the future for an interview

6. What is an open-ended question?

An open-ended question is one which is not easily answered with a simple "yes" or "no" response. Open-ended questions usually begin with "what," "how," or "why."

7. What is the purpose of a work flow analysis?

A work flow analysis gives an overall picture of a complicated work activity that cannot otherwise be seen at one time in any one place. It also divides the work activity into simple steps that you can see and understand easily.

8. TRUE (T) or FALSE (F)

F Written records and reports are your most important sources of information.

F Written records and reports usually provide reliable and accurate information.

T When you gather information through formal observation, everyone involved should be fully aware that they are being observed.

F One advantage of a work flow analysis is that it breaks down the work process into highly complex steps.

Teaching Plan 4

Gathering Information through Observation

OBJECTIVE	Gather information through observation.
METHODS	Self-instruction, class discussion
MATERIALS	Student Text—Unit 2, chalkboard, chalk, Worksheet for Exercise 7
PREPARATION	Obtain permission from a nearby health center or other appropriate office for the students to walk through during Exercise 7. Be sure to explain the purpose of the exercise to the office director. Make arrangements with more than one office in order to accommodate all of the students for their one-hour observation sessions in Exercise 8.

TIME: 4 hrs 30 min

LEARNING ACTIVITIES

- | | |
|--|--------|
| 1. Have the students review the instructions for Exercise 7 in the Student Text. Have them walk through a nearby office and observe the environment and the workers. Be sure they walk through singly or in pairs, not as a group. | 30 min |
| 2. Have the students complete the Worksheet for Exercise 7. Ask each student to report his observations to the rest of the class. Record these observations on a chalkboard. Lead a discussion based on the students' observations. | 30 min |
| 3. Repeat the exercise using a different office. | 30 min |
| 4. Have the students complete another Worksheet for Exercise 7. Lead a class discussion. Ask such questions as, "Do you think you were a better observer on the second visit? Why?" Or, "What kinds of things did you observe the second time that you did not notice the first time?" Collect both worksheets for review and evaluation. Compare the first worksheet with the second for each student to assess his progress. | 30 min |

	TIME
5. Have the students review the instructions for Exercise 8 in the Student Text. Take each student to an office for a formal observation exercise. Introduce him to the office manager and to the person to be observed. The students are to take notes on what they observe about the person's activities.	1 hr 15 min
6. Upon returning to the classroom, have the students prepare a written report from their notes. The written report should contain suggestions on how the activities of the person observed could be changed to improve his efficiency or effectiveness in his job. Collect the written reports and evaluate them for completeness and accuracy.	45 min
7. Return the reports to the students. Lead a class discussion of the reports.	30 min

Teaching Plan 5

Gathering Information through Interviews

OBJECTIVE	Gather information through interviews.
METHODS	Self-instruction, role-play, class discussion
MATERIALS	Student Text—Unit 2, Worksheet for Exercise 9, Worksheet A for Exercise 10, Worksheet B for Exercise 10

TIME: 6 hrs 15 min

LEARNING ACTIVITIES

- | | |
|--|----------------|
| 1. Have the students review the instructions for Exercise 9 in the Student Text. Divide the class into groups of three. Assign roles for the role-play. | 15 min |
| 2. Have the students present their role-plays. Remind them that the objective of the interview is to learn as much as possible about the career history of the person being interviewed. Have the observers complete the Worksheet for Exercise 9 and make their reports. | 1 hr
30 min |
| 3. Have each student prepare a written report based on the information he obtained in the interview. | 1 hr |
| 4. Have each student give his report to the student he interviewed. Each student should write his comments on how complete and accurate his own interview report is. Collect the reports. | 30 min |
| 5. Lead a class discussion based on these comments. Ask questions such as "How did it feel to be interviewed as opposed to doing an interview?" | 30 min |
| 6. Have the students review the instructions for Exercise 10 in the Student Text. Divide the class into groups of three. Have each group do three role-plays, so that each student can play the roles of a person in charge of a rural health center, a management analyst, and an | 2 hrs |

	TIME
<p>observer. The management analyst should fill out Worksheet A during the interview. The observer should complete Worksheet B, the observer's rating sheet. After each interview, the observer should report on his observations.</p>	
<p>7. Lead the class in a discussion of the exercise. Ask each group for an oral report of their experiences. Collect the worksheets for review and evaluation.</p>	30 min

Teaching Plan 6

Conducting a Work Flow Analysis

OBJECTIVE	Conduct a work flow analysis.
METHODS	Self-instruction, class discussion
MATERIALS	Student Text—Unit 2, Worksheet for Exercise 11, Worksheet for Exercise 12
PREPARATION	Contact the appropriate officials to obtain permission for your students to conduct a work flow analysis of an activity in an existing management system. Gain the cooperation of the official in charge to ensure that his employees will allow the students to interview them and have access to records. Explain to the official that the purpose of this exercise is to introduce each student to a typical management system. This exercise is not intended to criticize or disrupt the system.

TIME: 13 hrs 30 min

LEARNING ACTIVITIES

- | | |
|--|----------------|
| 1. Have the students read the instructions for Exercise 11 in the Student Text. Instruct the students to thoroughly read the case history. Explain the value of analyzing an activity by breaking it down into a series of steps. Ask the students to complete the present method column on the Worksheet for Exercise 11 and then to exchange worksheets with another student. They are to correct the worksheets following a class discussion. | 1 hr
30 min |
| 2. Have the students then describe a proposed method on the same worksheet. They should also exchange these descriptions with another student for review, comparison, and correction. Lead a class discussion of the exercise. Encourage the students to make further notes and corrections on their worksheets. | 1 hr
30 min |
- Refer to the completed sample worksheet included on the following pages. The proposed method on the sample shows one way the process might be

	TIME
improved. Compare and discuss the different improved methods developed by the students. Collect a worksheet from each student for review and final evaluation.	
3. Have the students review the instructions for Exercise 12 in the Student Text. Introduce the students to the officials in the office where they will begin the exercise. Be prepared to help the key management official select an appropriate activity to be analyzed. The student is expected to interview the key official to learn as much as possible about the activity and to obtain the names and locations of people who are involved. The student is expected to make all subsequent appointments for interviews and arrange for additional interviews if gaps in information become apparent.	6 hrs
4. Have the students conduct an analysis of the present method, using the Worksheet for Exercise 12.	1 hr
5. Have the students conduct an analysis of the proposed method, and compare the two.	1 hr
6. Have the students exchange worksheets. Lead a class discussion about the exercise.	30 min
7. Collect the worksheets for your review and discussion with the students. Have the students revise their worksheets as necessary.	1 hr
8. Have the students give a copy of the revised worksheets to the key management official. The students should ask the official for his review and comments. Arrange an appointment with the key officials for yourself and the students to review the results of the exercise.	1 hr

Form 4: WORK FLOW ANALYSIS

This is a general use form for recording and analyzing the flow of work activities. Keep extra copies of this form available to supplement the interview and survey forms that follow.

Activity <u>Processing Request for Leave forms</u>	
Begins <u>With requester in health center</u>	Ends <u>Personnel file</u>
Location <u>Apata District</u>	Date <u>15 November 1983</u>

PRESENT METHOD		PROPOSED METHOD	
Step Number	Action	Step Number	Action
1	Mid-level health worker fills out two copies of leave form	1	Mid-level health worker fills out two copies of leave form
2	Mid-level health worker sends original to district health officer and retains copy	2	Mid-level health worker sends both copies to district health officer
3	District health officer sends original to district administrative officer	3	District health officer checks for completeness, makes sure there are no administrative problems, makes decision to grant leave, and signs forms
4	District administrative officer checks for completeness	4	District health officer sends forms to district finance officer
5	District administrative officer sends form to district finance officer	5	District finance officer checks records to ensure available leave time, and signs forms
6	District finance officer checks records to ensure available leave time, and signs form	6	District finance officer sends forms to personnel clerk
7	District finance officer returns form to district administrative officer	7	Personnel clerk enters leave on master leave record and files originals
8	District administrative officer checks to make sure there are no administrative problems, and signs form	8	Personnel clerk returns duplicate copy to district health officer
9	District administrative officer returns form to district health officer		

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Form 4: WORK FLOW ANALYSIS

This is a general use form for recording and analyzing the flow of work activities. Keep extra copies of this form available to supplement the interview and survey forms that follow.

Activity <u>Processing Request for Leave forms, page 2</u>	
Begins _____	Ends _____
Location _____	Date _____

PRESENT METHOD		PROPOSED METHOD	
Step Number	Action	Step Number	Action
10	District health officer decides to grant leave, and signs form	9	District health officer informs mid-level health worker that leave has been granted
11	District health officer returns form to mid-level health worker		
12	Mid-level health worker signs form to acknowledge approval		
13	Mid-level health worker returns form to district health officer		
14	District health officer sends form to Personnel clerk		
15	Personnel clerk enters leave on master leave record form		
16	Personnel clerk files leave form		

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Teaching Plan 7

Summarizing and Analyzing Information for a Management Analysis Study

- OBJECTIVES**
1. Describe the methods used to gather and validate information.
 2. Summarize information on findings and use this information to formulate conclusions.
 3. Identify and select alternative recommendations for improving a management support system.

METHODS Self-instruction, class discussion

MATERIALS Student Text—Unit 3, chalkboard, chalk, completed forms for Exercise 14, Worksheet for Exercise 14, Worksheet for Exercise 15, Worksheet for Exercise 16, Worksheet for Exercise 17, Worksheet A for Exercise 18, Worksheet B for Exercise 18, Worksheet C for Exercise 18, Worksheet for Exercise 19

TIME: 12 hrs 45 min

LEARNING ACTIVITIES

- | | |
|--|--------|
| 1. Have the students read Unit 3 in the Student Text and answer the review questions. | 30 min |
| 2. Lead a class discussion of the review questions. | 30 min |
| 3. Have the students review the instructions for Exercise 13 in the Student Text. Ask the students to read and summarize the four subjective statements provided. The following is an example of a summary statement:
"There are many problems with the drugs and medical supplies system including: drug shortages, limited shelf life of drugs, and difficult ordering and purchasing procedures. These problems are caused by overly complex re-supply procedures characterized by a lack of a standard formulary, deficiencies in | 30 min |

	TIME
budgeting, and understaffing in the district accountant's office and the central pharmacy."	
4. Have the students meet in small groups to discuss their summary statements.	30 min
5. Lead a class discussion about rules to follow in summarizing information. Have the students revise their summary statements. Collect the revised summaries for review and evaluation.	30 min
6. Have the students review the instructions for Exercise 14 in the Student Text. Have them complete the Worksheet for Exercise 14. Be sure they study the completed workbook forms carefully.	30 min
7. Lead a class discussion on the exercise. Pay special attention to omissions of key information and distortions in information.	30 min
8. Have the students complete a new worksheet. Collect the completed worksheets for review and evaluation.	30 min
9. Have the students review the instructions for Exercise 15 in the Student Text. Return the completed worksheets from Exercise 14. Ask the students to explain the difference between findings and conclusions. Have them complete the Worksheet for Exercise 15.	30 min
10. Have the students meet in small groups to discuss the worksheets.	30 min
11. Have the students rewrite their worksheets based on the review and discussion. Collect the worksheets for review and evaluation.	30 min
12. Have the students review the instructions for Exercise 16 in the Student Text. Return the completed worksheets from Exercise 15. Have the students complete the Worksheet for Exercise 16. Ask the students to work alone to identify and describe as many alternative solutions as they can to the problems listed on the completed worksheet from Exercise 15. Collect the worksheets.	30 min
13. Lead a class discussion of the exercise. Point out some of the differences in recommendations that the students described.	15 min

	TIME
14. Have the students review the instructions for Exercise 17. Divide the class into small groups. Each group should review the findings and conclusions they developed in Exercise 15, select two or three problems, and then brainstorm for possible solutions. Each member of the group should complete the Worksheet for Exercise 17 and compare it to the Worksheet for Exercise 16. Review with the class the Brainstorming Guidelines for Exercise 17.	1 hr 30 min
15. Collect the completed worksheets. Assemble the class and review the exercise, leading a discussion of the students' recommendations and justifications. Point out the advantages and limitations of brainstorming. How many new ideas were generated? Of these, how many had some value?	30 min
16. Have the students review the instructions for Exercise 18 in the Student Text. Instruct the students to thoroughly read the case history. Discuss the case history with the class, helping the students to identify problems and root causes. Instruct the students to complete Worksheet A for stating the problem and identifying the root causes.	45 min
17. Have the students exchange papers, review and compare, and make notes.	15 min
18. Have the students complete Worksheet B, listing forces affecting change.	30 min
19. Have the students exchange papers, review and compare, and make notes.	15 min
20. Have the students complete Worksheet C, listing alternative approaches for solving the problems with advantages and disadvantages of each.	30 min
21. Have the students exchange papers, review and compare, and make notes.	15 min
22. Lead a class discussion of the exercise. Call on students to report on the approaches they listed on Worksheet C. List the approaches on the chalkboard. Then work back to Worksheets A and B, asking some of the students to report on what they entered on the forms. Discuss the content and the process. Ask the students	30 min

	TIME
<p>how the process could be improved and how they can see it applied to other problem situations.</p> <p>Collect the worksheets for review and evaluation. Return them for the students' future reference.</p>	
23. Have the students review the instructions for Exercise 19 in the Student Text. Have them complete the Worksheet for Exercise 19. Collect the worksheets.	30 min
24. Lead a class discussion about the exercise. Review the students' worksheets. Make sure they have clearly and completely described the study methods to be followed. Correct inaccuracies or omissions. Discuss your corrections with each student before he prepares his introductory section in the management system workbook. Remind the students that accurately completing this form is very important as it will guide their study activities and will also serve as an important part of their written study report.	30 min
25. Have the students revise their worksheets using the Description of Study Methods form in the management system workbook.	30 min

ANSWERS TO REVIEW QUESTIONS
Summarizing and Analyzing Information
for a Management Analysis Study

1. Why does a management analyst need to summarize and analyze information?

To develop findings and conclusions

2. From what you have read and experienced yourself, describe at least three categories of management problems.

- a. Problems of the formal structure of the system*
- b. Problems of the resources of the system*
- c. Problems of people's behavior in the system*

3. Give an example of a root cause of a problem.

An uninsulated metal galvanized roof is the root cause of a problem at the health center. An absence of required drugs at the health center was caused by slow response to requests for drugs by a central drug supply warehouse. The slow response was caused by high absenteeism due to illness, which was in turn caused by worker fatigue. Worker fatigue was caused by the high temperature at the work station, which was in turn caused by an uninsulated metal galvanized roof.

4. List the four methods you can use for analyzing problems and finding solutions.

- a. Observation and interviews*
- b. Brainstorming*
- c. Work flow analysis*
- d. Step-by-step analysis using forms*

5. TRUE (T) or FALSE (F)

T You will sometimes find inconsistencies in the information you have obtained.

F One obvious recommendation usually results from information summary and analysis.

- T The management analyst should take into consideration the behavior of individuals when preparing findings and conclusions.
- T Problems in a management system could be a result of earlier decision-making which treated symptoms of problems rather than root causes.
- F You carefully evaluate ideas for solutions to problems as they are expressed during a brainstorming session.
- T One method for analyzing problems and finding solutions involves a step-by-step process to identify forces affecting change.

Teaching Plan 8

Preparing a Written Report of a Management Analysis Study

OBJECTIVE	Write a report of management study findings, conclusions, and recommendations.
METHODS	Self-instruction, class discussion
MATERIALS	Student Text—Unit 4, management study report, writing paper
PREPARATION	Obtain copies of a management study report that the students can review in one hour or less of study time.

TIME: 6 hrs 30 min

LEARNING ACTIVITIES

- | | |
|--|--------|
| 1. Have the students read Unit 4 in the Student Text and answer the review questions. | 30 min |
| 2. Lead a class discussion of the review questions. | 15 min |
| 3. Have the students review the instructions for Exercise 20 in the Student Text. Using the management system workbooks the students have been assigned and the Student Text, have the students prepare an outline of a study report. Advise the students to include all parts of the report beginning with the title page and ending with the appendices. | 45 min |
| 4. Collect the outlines for review. Lead a class discussion about the outlines. Have the students revise the outlines and return them to you for review and evaluation. This exercise sets the stage for the report which is to be written at a later date and demonstrates to the student what he will be expected to produce as an end product of his study. | 45 min |
| 5. Have the students review the instructions for Exercise 21 in the Student Text.

Distribute the management report for the students' review. Have the students take notes on the content | 1 hr |

	TIME
and format of the report and identify key issues and critical gaps. Ask the students to use their notes to write a critique of the report.	
6. Have the students make oral presentations of their written critiques to the class. Lead the class in a discussion of the presentations.	1 hr 30 min
7. After the class discussion, have the students revise their critiques. Collect the revised critiques for review and evaluation.	30 min
8. Have the students review the instructions for Exercise 22 in the Student Text. Remind the students of why a letter of transmittal is written, who should sign it, and to whom it should be addressed. Have the students write a letter of transmittal to accompany the written report from Exercise 21. The letter should clearly describe the purpose of the written report, the scope of the report, and the intended next steps. Have the students exchange letters.	30 min
9. Lead a class discussion of the exercise. Give special attention to maintaining an objective tone to the letter and making sure that all categories of persons who should receive a copy of the report are clearly identified.	15 min
10. Have the students revise their letters. Collect the letters for review and evaluation.	30 min

ANSWERS TO REVIEW QUESTIONS

Preparing a Written Report of a Management Analysis Study

1. What is the purpose of a written report of a management analysis study?

A written report describes the system that has been studied and provides information on suggested improvements in the system to serve as the basis for further analysis and decision-making.

2. What are the things you should pay special attention to in preparing a written report?

- a. Understanding the audience*
- b. Presenting information as objectively as possible*
- c. Using a writing style, format, and tone that generate interest rather than boredom*
- d. Using words that are specific and commonly used, while avoiding jargon*

3. Outline the seven elements of the suggested report format in the order in which they should appear in the report.

- a. Letter of transmittal*
- b. Title page*
- c. Table of contents*
- d. Summary*
- e. Introduction*
- f. Study findings, conclusions, and recommendations*
- g. Appendices*

4. TRUE (T) or FALSE (F)

 T Preparing a written report is one of the management analyst's most important functions.

 F The written report stands alone and does not serve as the basis for further analysis.

 T The written report provides a common focus for people of different perspectives.

F The letter of transmittal does not refer to the intended use of the report.

F The appendix is a summary of the findings and recommendations contained in the report.

T It is always a good idea to use a standardized format for written reports.

Teaching Plan 9

Preparing and Presenting an Oral Report of a Management Analysis Study

OBJECTIVES	<ol style="list-style-type: none">1. Prepare an oral report of management study findings, conclusions, and recommendations.2. Present an oral report with and without visual aids.3. Prepare visual aids to illustrate key points in an oral report.
METHODS	Self-instruction, role-play, class discussion
MATERIALS	Student Text—Unit 5, management study reports, visual aids, Worksheet for Exercise 23, Worksheet for Exercise 24

TIME: 11 hrs 45 min

LEARNING ACTIVITIES	
1. Have the students read Unit 5 in the Student Text and answer the review questions.	30 min
2. Lead a class discussion of the review questions.	15 min
3. Have the students review the instructions for Exercise 23 in the Student Text. Distribute copies of different management reports to the students. Have them work individually to prepare outlines for their presentations. Visual aids are not to be used in this exercise so the students can concentrate on their public speaking skills. Review each student's presentation to ensure that it is of acceptable quality.	1 hr
4. Have the students rehearse their presentations.	30 min
5. Divide the class into groups. Have each student present his oral report to his group and also act once as an observer to critique another student's report. The observers should use the Worksheet for Exercise 23 to rate the presentations.	2 hrs

	TIME
6. Have the observers report to the class and lead a discussion about each presentation. Have the observers give their worksheets to the students whose presentations they observed. This will help the students revise their presentations for the next exercise.	1 hr
7. Have the students review the instructions for Exercise 24 in the Student Text. Have the students review the critiques of their oral presentations from the previous exercise. With the critique in mind, each student should revise his presentation and select appropriate visual aids to enhance the presentation.	1 hr
8. Monitor and help the students individually as they prepare their revised presentations and accompanying visual aids.	2 hrs
9. Have the students rehearse their presentations.	30 min
10. Have each student present an oral report using visual aids and also play the role of observer and critique at least one other presentation using the Worksheet for Exercise 24.	2 hrs
11. Have the observers report to the class and lead a discussion of the presentations.	1 hr

ANSWERS TO REVIEW QUESTIONS
Preparing and Presenting an Oral Report
of a Management Analysis Study

1. Describe the circumstances in which you may be called upon to make an oral report

Upon completion of a written report of a system study, senior officials may desire a briefing to help them make decisions on subsequent activities. Also, you may be required to make an oral presentation at a management workshop to help in decision-making.

2. Explain the two purposes of an oral report.

- a. To transfer essential information to listeners*
- b. To persuade listeners of the worth of what you are saying or advocating*

3. You want to prepare an effective oral report about your recent study of the communication system. What do you need to know to prepare this report?

- a. The amount of time available for the presentation and follow-up discussion, if any*
- b. Who the audience will be*
- c. The specific purposes of the presentation*

4. Name at least three types of visual aids that may be used for an oral report.

- a. Chalkboard*
- b. Flipcharts*
- c. Transparencies*
- d. 35mm slides*
- e. Handouts*

5. Why should you rehearse your oral report?

To familiarize yourself with the major points you wish to emphasize and to become familiar with the physical setting and positioning of visual aid equipment

6. TRUE (T) or FALSE (F)

F You should memorize your oral report.

T One purpose of an oral report is to persuade listeners of the worth of what you are saying or advocating.

F The chalkboard is not an effective visual aid and should be avoided.

F If you know your material, rehearsal is seldom necessary.

T Question and answer sessions are an effective way to conclude your presentation.

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APPENDIX

Pretest

1. What is management development?

Management development is a long-range, step-by-step process for improving an organization's management performance. Management development is concerned with training workers to improve their management skills and improving the systems within which they work.

2. You have been assigned to study a health program's communication system. What steps would you take to accomplish this task?

- a. Review background information*
- b. Develop a plan for conducting the study*
- c. Gather information*
- d. Summarize and analyze the information*
- e. Identify possible solutions to problems identified*
- f. Prepare a written report of findings, conclusions, and recommendations*
- g. Present an oral report of findings, conclusions, and recommendations*
- h. Help implement changes*

3. Describe in the correct sequence the five steps in the management systems improvement process. Indicate in which steps you, as a management analyst, will be directly involved.

- a. Preparation: This involves orienting and training the people who will be involved in the system improvement effort. It also involves obtaining the official approvals to proceed with a system improvement effort. The analyst would not usually be involved here, except to be trained.*
- b. Management analysis: This involves conducting a thorough study of the system by a management analyst. The management analyst also prepares and presents reports from the study.*

- c. *Decision-making: This involves a group review and revision of study findings, conclusions, and recommendations, and the preparation of workshop reports and other papers requesting and justifying system improvement actions. The analyst would be involved as an advisor and would assist with the writing of reports and related papers.*
- d. *Implementation: This involves preparing and distributing new policies and procedures, revising training materials, and conducting orientation and training for people affected by changes. The analyst could be asked to help write the new policies, procedures, and training materials.*
- e. *Evaluation and systems renewal: This involves assessing the performance of the system on a continuing basis and repeating all or part of the development phases described above whenever major improvements are necessary. The analyst might be asked to assist with any of these activities.*

4. What is the difference between random and representative sampling?

In a random sample, each element has an equal probability of occurring. In a representative sample, each element represents different, often diverse characteristics.

5. What are the three basic sources of information for a management analysis study?

- a. *Records, reports, and other written documents*
- b. *Direct observation of events and conditions*
- c. *The memories and insights of other people*

6. What is the purpose of a work flow analysis?

A work flow analysis gives an overall picture of a complicated work activity that cannot otherwise be seen at one time in any one place. It also divides the work activity into simple steps that you can see and understand easily.

7. From what you have read and experienced yourself, describe at least three categories of management problems.

- a. *Problems of the formal structure of the system*
- b. *Problems of the resources of the system*
- c. *Problems of people's behavior in the system*

8. List the four methods you can use for analyzing problems and finding solutions.

- a. Observation and interviews*
- b. Brainstorming*
- c. Work flow analysis*
- d. Step-by-step analysis using forms*

9. What is the purpose of a written report of a management study?

A written report describes the system that has been studied and provides information on suggested improvements in the system to serve as the basis for further analysis and decision-making.

10. Outline the seven elements of the suggested report format in the order in which they should appear in the report.

- a. Letter of transmittal*
- b. Title page*
- c. Table of contents*
- d. Summary*
- e. Introduction*
- f. Study findings, conclusions, and recommendations*
- g. Appendices*

11. TRUE (T) or FALSE (F)

F You should memorize your oral report.

T One purpose of an oral report is to persuade listeners of the worth of what you are saying or advocating.

F The chalkboard is not an effective visual aid and should be avoided.

F If you know your material, rehearsal is seldom necessary.

T Question and answer sessions are an effective way to conclude your presentation.

Posttest

1. What is management development?

Management development is a long-range, step-by-step process for improving an organization's management performance. Management development is concerned with training workers to improve their management skills and improving the systems within which they work.

2. Management analysis is a new concept to many people. You have been asked to explain it to a group of health officials. What would you tell them?

Management analysis is the study of the causes of and alternative solutions to management problems.

3. You have been assigned to study a health program's communication system. What steps would you take to accomplish this task?

- a. Review background information
- b. Develop a plan for conducting the study
- c. Gather information
- d. Summarize and analyze the information
- e. Identify possible solutions to problems identified
- f. Prepare a written report of findings, conclusions, and recommendations
- g. Present an oral report of findings, conclusions, and recommendations.
- h. Help implement changes

4. Describe in the correct sequence the five steps in the management systems improvement process. Indicate in which steps you, as a management analyst, will be directly involved.

- a. *Preparation: This involves orienting and training the people who will be involved in the system improvement effort. It also involves obtaining the official approvals to proceed with a system improvement effort. The analyst would not usually be involved here, except to be trained.*

- b. *Management analysis: This involves conducting a thorough study of the system by a management analyst. The management analyst also prepares and presents reports from the study.*
 - c. *Decision-making: This involves a group review and revision of study findings, conclusions, and recommendations, and the preparation of workshop reports and other papers requesting and justifying system improvement actions. The analyst would be involved as an advisor and would assist with the writing of reports and related papers.*
 - d. *Implementation: This involves preparing and distributing new policies and procedures, revising training materials, and conducting orientation and training for people affected by changes. The analyst could be asked to help write the new policies, procedures, and training materials.*
 - e. *Evaluation and systems renewal: This involves assessing the performance of the system on a continuing basis and repeating all or part of the development phases described above whenever major improvements are necessary. The analyst might be asked to assist with any of these activities.*
5. What is the purpose of a management system workbook?
- A management system workbook provides step-by-step guidelines for planning and conducting a study of a management support system.*
6. What is the difference between random and representative sampling?
- In a random sample, each element has an equal probability of occurring. In a representative sample, each element represents different, often diverse characteristics.*
7. What are the three basic sources of information for a management analysis study?
- a. *Records, reports, and other written documents*
 - b. *Direct observation of events and conditions*
 - c. *The memories and insights of other people*
8. What is the purpose of a work flow analysis?

A work flow analysis gives an overall picture of a complicated work activity that cannot otherwise be seen at one time in any one place. It also divides the work activity into simple steps that you can see and understand easily.

9. Why does a management analyst need to summarize and analyze information?

To develop findings and conclusions

10. From what you have read and experienced yourself, describe at least three categories of management problems.

- a. Problems of the formal structure of the system*
- b. Problems of the resources of the system*
- c. Problems of people's behavior in the system*

11. Give an example of a root cause of a problem.

An uninsulated metal galvanized roof is the root cause of a problem at the health center. An absence of required drugs at the health center was caused by slow response to requests for drugs by a central drug supply warehouse. The slow response was caused by high absenteeism due to illness, which was in turn caused by worker fatigue. Worker fatigue was caused by the high temperature at the work station, which was in turn caused by an uninsulated metal galvanized roof.

12. List the four methods you can use for analyzing problems and finding solutions.

- a. Observation and interviews*
- b. Brainstorming*
- c. Work flow analysis*
- d. Step-by-step analysis using forms*

13. What is the purpose of a written report of a management study?

A written report describes the system that has been studied and provides information on suggested improvements in the system to serve as the basis for further analysis and decision-making.

14. What are the things you should pay special attention to in preparing a written report?

- a. *Understanding the audience*
 - b. *Presenting information as objectively as possible*
 - c. *Using a writing style, format, and tone that generate interest rather than boredom*
 - d. *Using words that are specific and commonly used, while avoiding jargon*
15. Outline the seven elements of the suggested report format in the order in which they should appear in the report.
- a. *Letter of transmittal*
 - b. *Title page*
 - c. *Table of contents*
 - d. *Summary*
 - e. *Introduction*
 - f. *Study findings, conclusions, and recommendations*
 - g. *Appendices*
16. Describe the circumstances in which you may be called upon to make an oral report.

Upon completion of a written report of a system study, senior officials may desire a briefing to help them make decisions on subsequent activities. Also, you may be required to make an oral presentation at a management workshop to help in decision-making.

17. TRUE (T) or FALSE (F)

- F You should memorize your oral report.
- T One purpose of an oral report is to persuade listeners of the worth of what you are saying or advocating.
- F The chalkboard is not an effective visual aid and should be avoided.
- F If you know your material, rehearsal is seldom necessary.
- T Question and answer sessions are an effective way to conclude your presentation.