

The
Family
Planning
Management
Training
Project

Management Reference Library Abstracts

This document contains abstracts of documents relevant to family planning managers, management trainers and researchers. This comes from the Family Planning Management Training Project's computerized library system in which the information is coded by language, type of material, relevance to family planning, and management skill area, and thus provides easy access to succinct information on a large number of management training materials.

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Introduction to the Use of this Document

This compilation of abstracts was developed to assist trainers in selecting appropriate materials for preparing workshops and training sessions. The materials abstracted include background readings, exercises, training tools, course modules, and sample forms. Although most of the material focuses on family planning, there are also excellent materials which deal with general health and management issues.

To facilitate identification and selection of materials, the manual is divided into ten subject areas: Cases; Finance; Human Resource Management; Information, Education and Communication; Logistics; Management Information Systems; Monitoring and Evaluation; Planning; Policy; and Training of Trainers. In addition, all abstracts are coded by language; there are materials in English, French, Spanish, and Portuguese. Within each section, entries are listed alphabetically by the author's last name or, if there is no last name, by title.

See the sample entry on the next page.

Sample Entry

(1) Vriesendorp, Sylvia, Paula Caproni, and Vincent David. (2) Pandora Family Planning Program Simulation: (3) Family Planning Management Training Project; Management Sciences for Health; Boston, Massachusetts; 1988; 100 pp.

Note: There is a complimentary safe motherhood simulation that is based on the same design and is called The Safe Motherhood Initiative of Pandora.

(4) The Pandora Simulation places training participants in a fictional country and health care system. This simulation is designed to strengthen the leadership and management of family planning programs in developing countries. It provides participants with an opportunity to practice general management skills in a realistic setting, thus enabling them to see the consequences of their own behavior and decisions. Each participant plays the role of a representative of one of four groups: The Ministry of Health, the regional administration, a health facility (clinic or health center) or the village. By assuming these roles, the participants must deal with a number of problems and constraints. The simulation encourages participants to see their health delivery system from the bottom up and gives them a better idea of the client's point of view. The Trainer's Package includes a trainer's guide, background materials and handouts and instructions. The simulation requires 3 to 6 hours and ideally it accommodates 12 to 30 people.

(5) HRM - Coordination

(6) EXER/ FIN/ GEN/ HRM/ (7) POL/ IEC/ LOG/ M&E/ MIS/ PLN/

(8) Coordination/ Organizational development/ Decentralization/ Budgeting/ Situational analysis/ Goal setting/ (9) Target setting/ Community relations/ Decision making/ CBD programs/ (10) ENG/ FRE/ (11) INT/

In the sample entry above, the various parts of the entry are defined:

1. Vriesendorp: Author's name, last name first.
2. Pandora Family Planning etc.: Title - this would come first if there were no author name.
3. Family Planning Management Training Project: Bibliographic information.
4. Abstract.
5. HRM - Coordination: location in our library - shelf name and file name.
6. EXER (Exercise): Type of Material.
7. POL/ IEC/ LOG/ etc: Skill area.
8. Coordination/ etc.: Index topic abbreviation. On our system we can search for documents bearing this index code and print out a list of all papers related to this topic.
9. Target setting/ etc.: Key phrase or idea in the document. We can also search for this.
10. ENG/ etc.: Language -- ENG = English, FRE = French, SPA = Spanish, POR = Portuguese.
11. INT or DOM means internationally or domestically focused article. Some listings will have 3 letter country codes.

FPMT LIBRARY - CASES

1. Alfonso, Felipe B. Bali (A). Manila, Philippines: Asian Institute of Management; 1978; 19 pp.

Note: This case is located in the A.I.M. Casebook.

This case contains detailed information on Bali's family planning program. Background information is provided to the reader on the following: the history of family planning in Indonesia and in Bali; the religion of Bali; the political and social environment; and the program performance. The program has begun to experience several problems. These are briefly outlined in the final paragraphs suggesting that the reader use both the narrative information and the supplemental data in exhibit form to perform a thorough analysis and recommend an adjusted program strategy. There is an appendix to the case that is an excerpt from a book on Bali. In the excerpt the author describes the local government and village systems. NB - There is a complimentary case on Bali; Bali (B). The author is Alejandro A. Reyes.

PLN-Shelf.

CASE/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Demand for Contraceptives/ Community Participation/ Target Setting/ Project Development/ IND/ INT/.

2. Alphonso, Felipe B. Mechai Viravaidiya (A). Manila, Philippines: Asian Institute of Management; 7 pp.

Note: This case is contained in the AIM Casebook.

This case profiles the planning process undertaken by the founder of the Thai Family Planning program, Mechai Viravaidiya. The policy environment is described, as are the steps he used to perform a needs assessment and to write long term program goals and a preliminary action plan. The alternatives that Mechai Viravaidiya considered for both distribution and financing are detailed, providing the reader with a sense of the origins of this innovative and successful program. NB: This casebook contains another case that looks at the same program after it is well established. It is entitled, "The Family Planning and Rural Development Associates (FPA)".

PLN-Shelf.

CASE/ FP/ PLN/ PLN-3/ PLN-4/ PLN-6/ ENG/ Program Planning/ Needs Assessment/ Situational Analysis/ THA/ INT/.

3. Anker, Herman (Harvard University). Pine Grove Health Center.

This case focuses on resolving interpersonal conflicts within a health care setting. The reader is provided with background information on the organization of the health center, and a sequence of the events that define the current problem. Three questions are posed which require the reader to examine the role of the different level managers both in resolving this conflict, and in reducing the chance of subsequent conflict within this setting. This case could be used as the basis for a classroom discussion or as a prepared assignment.

HRM-Managing Conflict.

CASE/ HEALTH/ HRM/ HRM-1/ HRM-9/ ENG/ Conflict Resolution/
Management Style/ Supervision.

4. Anonymous (Harvard School of Public Health). The Aga Khan Health Services: Monitoring Lady Health Visitors in Pakistan. Boston, MA: HSPH; April 26, 1985; 27 pp.
This case describes the rural health system in Pakistan detailing the organizational structure, and the systems for monitoring, supervision and logistics. Due to continuing expansion and heavy utilization, the current monitoring and evaluation system doesn't adequately serve the needs of management or the Lady Health Visitors who deliver the bulk of health services and is asked to address the following: 1) What are the objectives of the central health board of Pakistan for the monitoring and evaluation system, both internally and with organizations outside Pakistan?; 2) What are the major problems with the current non-clinical reporting system?; 3) What changes would you recommend to the monitoring evaluation system?; 4) How would you revise the monthly activity report of the LHV?; and 5) What are the benefits and resources required for this proposed system? Included are copies of: organizational charts; forms used at clinic level to record patient information; and monthly and annual activity reports submitted by personnel at the different levels of the system. The responses to the questions could be prepared individually or by small groups and then presented for discussion.

M&E- Management Control Systems.

CASE/ HLTH/ M&E/ HRM/ LOG/ M&E-3/ M&E-4/ M&E-5/ ENG/
Organizational Design/ Supervision/ Logistics/ Data Sources and
Collection Methods/ Evaluation/ PAK/ INT/.

5. Anonymous. La Cooperative AD; 3 pp.

This case describes the first few months in the life of a manager of an agricultural supplies cooperative, who is new to the job. It can be used to introduce the concept of management and the task of a manager. The case touches on the following issues: what is management; what does a manager do; delegation; supervision; planning; personnel management; financial management; etc.

HRM-Management, General.

CASE/ GNL/ HRM/ HRM-1/ FRE/ Management functions/ Management
style/ AFR/ INT/.

6. Anonymous. La Delegation Effective; 25 pp.

This is a theoretical note on effective delegation which includes: a list of signals of non-effective delegation; a sheet with viewpoints for and against delegation; a self-test "Etes-vous un bon delegateur?"; and, delegation worksheets. Trainers could use this information to develop a short case.

HRM-Delegation.

CASE/ TOOL/ READ/ FRE/ GNL/ Delegation/ Management Style/ INT/.

7. Anonymous. El Libertador: Health Care Delivery In A Caracas Barrio. Tunis; May 15-17, 1984; 17 pp.

This two part case is a discussion of various aspects of a health service post in a poor urban settlement in Venezuela. The first part of the case focuses on the implications for the health post of a structural reorganization and decentralization of the Health Ministry. Background information is provided and the reader is asked to analyze the reorganization, and to make recommendations as to how the limitations might be overcome. The reader is asked to assess the decentralization in terms of such variables as: personnel training; anatomy; information; patient relations; and service coverage; In the second part of the case, the analysis focuses on logistics support from the Ministry of Health. The reader is then asked to determine what institutional changes could be made and how human resources could be utilized to overcome organizational deficiencies. The analysis could be the basis for classroom discussion or the basis for a written assignment.

Hrm-Organizational Development.

CASE/ HLTH/ HRM/ LOG/ HRM-10/ LOG-1/ Organizational Development/ Logistics Cycle/ INT/.

8. Anonymous. A Program for Health Manpower Development; 1984; 4 pp.

This case describes a health manpower problem in a developing country. Background information is provided on the country and on how health manpower is utilized in the delivery system. The reader is asked to address the manpower issue, taking into account distribution training and shortages, caused in part by emmigration of trained health personnel to western countries. A six step program to remedy the problem is outlined and the reader is asked to identify the advantages, the expected shortcomings and the possible shortcomings for each step. The case is designed to raise multiple issues about manpower planning and could be used as the basis for class discussion or for a written analysis. NB: Accompanying the case are the notes of a student who analyzed the case.

HRM-Manpower planning.

CASE/ HLTH/ HRM/ HRM-7/ ENG/ Manpower planning/ Manpower supply/ Manpower projections/ Manpower requirements/ In-service training/ Supervision/ INT.

9. Anthony, Robert N. and David Young. Management Control in Non-Profit Organizations. Homewood, IL: Irwin; 1984; 680 pp.

This text on financial management and control was written specifically to improve the skills of individuals working in non-profit organizations. Although written to apply to all types of non-profit organizations including governmental entities, the book can easily be adapted for a course that focuses on health care by selecting appropriate cases from the 48 that are included. The text can be used as a whole, or to focus on a specific skill such as: accounting; budgeting; pricing decisions; cost analysis; cost benefit analysis; reporting; or evaluation.

The text can be used as background reading for participants, or to provide trainers with lecture materials. Each of the cases comes with a series of questions for the reader to address and can be used to prepare written exercises or as the basis for discussion.

FIN-Shelf.

Book/ case/ GML/ FIN/ FIN-1/ FIN-2/ FIN-3/ FIN-4/ ENG/
Accounting/ Cost analysis/ Cost benefit analysis/ Pricing
policies/ Budgeting/ Government support/ BB/ INT.

10. Anthony, Robert N. and Regina Herzlinger. Nasus Clinic. Homewood, Illinois: Richard D. Irwin, Inc.; 1980; 2 pp.

Note: from "Management Control in Nonprofit Organizations".

This short case outlines an ambulatory care clinic that recently began to experience losses. Exhibits detailing the monthly standard labor costs, overhead expenses, and the actual labor expenses are provided. The participant is asked to analyze the information to determine the standard and actual profits, deviations from expected profits and to propose a solution to the problems being experienced by the clinic.

FIN- Cost analysis.

Case/ HLTH/ FIN/ FIN-1/ Eng/ Cost analysis/ INT.

11. Arias, Maria Eugenia. Honduras Case 1: A Shortage of Supplies. Boston: Management Sciences for Health; September 1986.

Note: This case is currently in draft form.

This complex case describes the logistics problems in the Honduran family planning program. Detailed information on the history and organization of the program provides the reader with data to analyze the problems of contraceptive distribution at different levels. The findings of a consultant brought in to study the problem are included in the body of the case. The reader is asked to assume the role of the head of the MCH division at the Ministry of Health and determine how to resolve the problems occurring throughout the program.

LOG-Logistic Management.

CASE/ FP/ LOG/ LOG-1/ LOG-2/ LOG-5/ LOG-6/ LOG-7/ LOG-8/ ENG/
Logistics cycle/ Procurement/ Inventory management/ HON/ INT/.

12. Arias, Maria Eugenia (The Family Planning Management Training Project). A Transfer. Boston, MA: Management Sciences for Health; 1987; 2 pp.

In this short case set in Africa, a midwifery sister working for the Local Government Area is being transferred to a new community where she will be responsible for planning and implementing a family planning program. Some background information on the midwife's previous work is given and on the community she is being transferred to. The leader is asked to assume her role and to identify the information needed to draw up a plan, as well as some of the anticipated obstacles to implementation. Trainers could use this case as the basis for a group discussion or a prepared assignment. Written questions accompany the case.

PLN-Program Cycle.

CASE/ FP/ HRM/ PLN/ HRM-1/ PLN-4/ PLN-5/ PLN-6/ ENG/ Strategic Planning/ Program Planning/ Needs Assessment/ Community Survey/ User Perspective/ Implementation/ AFR/ INT/.

13. Austin, James A. Primary Health Care in Honduras ed. Boston, MA: Harvard Business School; 23 pp.

In this case, an AID health officer in Honduras is faced with a financial crisis caused by a lack of funds to cover recurrent costs. This crisis is affecting the continuance of an AID multi-million dollar primary health project. His task is to develop a convincing project which addresses the economic, political, and organizational constraints surrounding the program. Using extensive background information, the reader is asked to take on the challenge faced by the health officer, and to evaluate the health options available to both reduce and meet recurrent costs. The analysis is to include: looking at alternative financing mechanisms, including user fees, prepayment schemes, and a rotating drug fund; potential cost containment, efficiency and productivity measures for hospital construction and development; and new roles for both public and private sector institutions. This case could be used to work on each of these areas or to address them individually. NB: Village Health Workers in Honduras is another case on primary health delivery in Honduras that covers: productivity; efficiency; program impact; cost effectiveness; anticipated recurrent costs; and monitoring procedures.

FIN- Health care financing.

Case/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-3/ ENG/ Health Care Financing/ Fiscal Techniques/ Cost Analysis/ Resource Development/ User Financing/ Prepayment Plans/ Recurrent and Fixed Costs/ INT.

14. Baydin, Lynda Diane (Harvard University). Stephen Doyle Case. Cambridge, MA: Harvard University; 1973; 4 pp.

Presented in four parts, this case asks the reader to analyze some problems encountered by the Director of Training in an urban medical center. The problems resulted from a combination of factors including: improper operating procedures; a lack of performance appraisal; poor communications between line staff and supervisors; and the absence of an appropriate monitoring system. While the case focuses on a large medical center, the problems encountered can occur in any level of the health delivery system and the case could be readily adapted to a different setting. The design of this case lends itself to group analysis and discussion.

HRM-Problem Solving.

CASE/ HLTH/ HRM/ HRM-1/ HRM-9/ ENG/ Supervision/ Problem Solving/ Records/ Operating Procedures/ Performance Appraisal/ INT.

15. Bellamine, Hammouda. Case Study In Family Planning Management: Republic of Keutaga; November 1986; 23 pp. Written for a CAFS training course held in Nairobi, this case contains a comprehensive description of the fictitious country of Keutaga. Divided into five sections, the narrative includes: a profile of the country; population and demographic data; health data; a discussion of population and development; and, the current family planning situation. Supplementing the narrative are many exhibits of demographic, agricultural, economic, educational, health and contraceptive data. Although the case lacks teaching notes or prepared questions, trainers could use this in a number of ways. Possibilities include using the data to perform a needs assessment or situational analysis, or as the basis for a discussion on general management issues.
PLN-Strategic Planning.
CASE/ FP/ PLN/ PLN-4/ PLN-6/ ENG/ Population Dynamics/ Management, General/ Family Planning Programs/ Needs Assessment/ Situational Analysis/ AFR/ INT/.

16. Bennison, Malcolm and Jonathan Casson. The Manpower Planning Handbook. United Kingdom: McGraw Hill Book Company Limited; 1984; 314 pp.
This book provides a very detailed and comprehensive description of the various components of manpower planning. It emphasizes a decision-making approach to managing people as a resource, and includes a structured approach to understanding manpower flows within an organization. There are eleven chapters in the books and cases are used as examples throughout the text.
HRM- Shelf.
Read/ Case/ GNL/ HRM/ HRM-7/ ENG/ Manpower Planning/ INT.

17. Berge, Noel and Marcus Ingle and Marcia Hamilton. Microcomputers In Development : A Manager's Guide. first ed. West Hartford, CT: Kumarian; Press; c1986; 31 pp; ISBN 0-931816-05-X. "This guide is written for development personnel responsible for the management of projects or institutions interested in acquiring or expanding their use of microcomputers...The guide includes: an overview of computing equipment and applications; potential applications of microcomputers in the management of development projects and institutions; a description of microcomputer software programs and hardware components; suggestions for assessing the need for a microcomputer including the pros and cons of microcomputers in developing country situations; the strengths and limitations of microcomputers; future trends; and a computer glossary". Seven detailed case histories of the application of microcomputers in managing development projects, are provided to illustrate some of the successes and problems that might be anticipated. Trainers could use this as a comprehensive reference to keep in their library for designing a course or workshop on this subject and to give to participants as a resource for their own libraries.
MIS-Shelf.
MAN/ READ/ CASE/ GNL/ MIS/ MIS-1/ MIS-2/ MIS-3/ MIS-4/ MIS-5/

MIS-6/ Mis-7/ ENG/ Program Monitoring Systems/ THA/ KEN/ LAC/
IND/ PAK/ BB/ INT/.

18. Bergthold, Gary. Planificacion Desde la Base en las Zonas Rurales de Ecuador (Planning from a Base in the Rural Zones of Ecuador); 21 pp. (Cases About the Administration of Family Planning Clinics).

The director of Ecuador's Ministry of Health family planning program turns to a consultant to help improve his organization's employee motivation and emotional involvement. The case is based in a real situation and was prepared with the help of Edgar Jacome, the consultant.

HRM - employee motivation.

CASE/ GEN/ FP/ HRM/ HRM - employee motivation/ SPA/ INT/.

19. Bergthold, Gary D., Galo Pozo and Edgar Jacome Salvador. Bottom-Up Planning in Rural Ecuador. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1974; c1977: p203 - p242; 40 pp.

Note: This case is the tenth of twelve located in the Casebook For Family Planning Management.

This case focuses on the role of training as a key management tool for family planning programs. The reader is asked to advise the head of the Ecuadoran Ministry of Health's family planning program on whether a specific training program will improve the performance of clinic personnel. A detailed description of the training program is given, including a narrative tracking a group of trainees through the program and evaluating their performance once back in their work environment. This complex case raises many issues about training design, motivation, supervision, performance appraisal, target setting, objective setting, action steps, and program performance. A study guide precedes the case, posing questions for the reader to consider while reading the case." [A comprehensive analysis follows looking at what actual changes, resulted in the training program] how the training caused these changes, and what problems resulted." Trainers could use this case as the basis for a session on staff development, or training as a component of human resource management.

HRM-Shelf.

CASE/ FP/ HRM/ PLN/ HRM-1/ ENG/ SPA/ In-service Training/ Target Setting/Objectives Setting/ Action Plan/ Performance Appraisal/ Staff Development/Supervision/ Participative Management/ ECU/
LAC/ INT/.

20. Bossert, Thomas, PhD (Harvard School of Public Health). The Politics of Primary Health Care in Guatemala. Boston, MA: President and Fellows of Harvard College; April 3, 1984; 8 pp. Case study of the development of a system of health workers for rural Guatemala. Reveals how the interaction of the different political groups eventually resulted in a multi-tiered program that was later dissolved by significant political changes within the country. Questions are posed at three intervals in the presentation of the case and could be used as a written exercise and/or basis for discussion.

POL-Public Health Policy.

CASE/ HLTH/ POL/ POL-2/ ENG/ Political factors/ Local government/ State government/ INT/ GUT.

21. Brinkerhoff, Robert O., Dale M. Brether, Terry Hluchyj and Jeri Ridings Nowakowski. Program Evaluation: A Practitioner's Guide for Trainers and Educators: A Design Manual. Boston: Kluwer-Nijhoff; 1983; 154 pp.

Note: There is a Sourcebook/Casebook, 385pp, in addition to the design manual.

This two volume package of materials "is for use in training, teacher education, and other professional development programs and projects in private and public agencies, schools, and universities. They are designed to help individuals or groups in the own work, and they can be used to train others. The package has the following components: the Sourcebook, which contains chapters of guidelines, resources and references for each of seven key evaluation functions; the Casebook, which is a collection of twelve stories about evaluation applied to real-life projects and programs in different settings; and a set of directions, worksheets, examples, and checklists to help you design an evaluation for a particular use."

M&E-Shelf.

READ/ TOOL/ CASE/ GNL/ M&E/ TOT/ M&E-1/ M&E-2/ M&E-3/ M&E-4/ M&E-5/ ENG/ Evaluation/ Program Evaluation/ INT/.

22. Centre for Management Development. Management Case Book. Lagos, Nigeria: Centre for Management Development; 1985; 200 pp. Based on real cases from Nigeria, this book focuses on a range of management issues. It contains 37 cases which have been divided into four content areas: general management; personnel management and industrial relations; marketing management; and accounting and financial management. Each case is accompanied by discussion questions. None of the cases included are based in a health care setting, but some of the issues raised are applicable and can be adapted.

HRM- Shelf.

Case/ GNL/ HRM/ FIN/ HRM-1/ HRM-2/ HRM-3/ HRM-4/ HRM-9/ FIN-4/ Eng/ Management, General/ Supervision/ Organizational Development/ Financial Planning and Management/ INT/ NIR.

23. Chamorro C., Edgar, John C. Ickis and Gary D. Bergthold. The Banderas MCH/FP Program. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1976; c1977: p243 - p264; 22 pp.

Note: This case is the eleventh of twelve case located in the Casebook For Family Planning Management.

"This case focuses on the supervisory process in a national integrated maternal and child health and family planning program in Latin America. The program director is overwhelmed by the paperwork generated by clinic visits of his supervisors and seeks assistance in deciding what to do about it." The reader is asked to determine if the problem is supervisory or one resulting from inappropriate organizational design. In addition, the reader is asked to "develop two different sets of recommendations: 1) a set of recommendations that could improve the supervision within the existing supervisory structure, and 2) a set of recommendations for changing the supervisory structure to better support effective program performance." Trainers could use this case as the basis for a group exercise or an individual assignment, or as a component of a unit focusing on supervision and organizational design.

HRM-Shelf.

CASE/ FP/ HRM/ HRM-10/ ENG/ SPA/ Organizational Design/
Organizational Development/ Supervision/ INT/ LAC/.

24. Chamorro, Edgar. Programa de Salud Materno-Infantil de Banderas (Banderas' Maternal and Infant Health Program): INCAE, reproduction prohibited.; 1974; 17 pp.

The article is a case dealing with a fictional Central American country. It addresses human resource management problems in a maternal and child health program.

HRM - human resource management.

CASE/ FP/ GEN/ HRM/ SPA/ INT/ HRM - human resource management/.

25. Christensen, C. Roland. Teaching and the Case Method. Abby J. Hansen. Boston, MA: Harvard Business School; c1981,1987; 290 pp; ISBN 0-87584-178-3.

A product of the Harvard Business school, "this book is a compilation of text, cases and readings for two seminar programs of the case method of teaching. Following an introductory section Parts II and III contain materials to assist readers in experimenting with conducting a seminar program. Part II is aimed at liberal arts instructors and part III at educators in professional schools". The book concludes with a section containing supplementary materials for seminar participants. Trainers who are planning to use the case method will find this a comprehensive guide. There are a number of cases included in each section and an instructor's guide is available for separate purchase.

TOT-Shelf.

READ/ CASE/ GNL/ TOT/ TOT-1/ ENG/ Teaching Methodologies/ Case Writing/ Case Teaching/ RTI/ BB/ INT/.

26. Control Inflacionario con Recesion (Inflationary Control During a Recesion): El Comercio; 7 January 1988; 3 pp. Newspaper account of Ecuador's battle with inflation. CASE/ GEN/ SPA/ INT/.

27. Cordiner, Ralph J. Decentralisacion - Un Filosofia Gerencial (Decentralization - A Managerial Philosophy). INCAE - restricted distribution: Richard D. Irwin corp, IL.; 13 pp. (Management Control Systems).

The president of General Electric discusses his company's tradition of decentralization and gives suggestions on how a company can implement a similar system.

POL - decentralization.

CASE/ GEN/ POL/ SPA/ INT/ POL - decentralization/.

28. de Bernard, Carmen, and David C. Korten. The Model Clinic. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1973; c1977: p183 - p202; 20 pp.

Note: This case is the ninth of twelve located in the Casebook For Family Planning Management.

In this case the executive director for the Fund for Family Planning Activities (FFPA), a private international family planning funding organization, must make a recommendation to the Board as to whether or not to fund a model clinic to serve as a training program. In the fictitious Latin American country two groups are involved with providing family planning. The Ministry of Health is the primary channel for the delivery of family planning services, and the Veruguan Demographic Association (VDA) is a private family planning organization. The activities of each organization are described, followed by a discussion of the need for training. The reader is asked to assume the role of the executive director of the FFPA and to try and weigh the options for an effective training program. The casebook introduces the topic of training with a description of the principles that should be applied in designing a training program. A study guide precedes the actual case, providing readers with a framework to consider the case and on which to base recommendations. The analysis thoroughly dissects the case raising important points that must be assessed when designing any training programs. Trainers could use this case to illustrate the need for carefully constructed training programs and as the basis for discussion on the various objectives served by training.

HRM-Shelf.

CASE/ FP/ HRM/ PLN/ TOT/ HRM-5/ TOT-2/ ENG/ SPA/ Program Planning/ In-service Training/ Staff development/ Teaching Methodologies/ LAC/ INT/.

29. De Jesus, Edilberto C. (Don Andres Professor of Business Management). Davao Del Sur POPCOM-PROCOM Outreach Program. Manila, Philippines: Asian Institute of Management; 1978; 27 pp. Note: This case is contained in the AIM Casebook.

A range of project management issues are the subject of this case on a population outreach program in the Philippines. The outreach program is described including a discussion of some of the barriers to program success. Trainers might be able to use this to provide an overview of some of the issues an outreach program manager might face and how they can be addressed.

PLN-Shelf.

CASE/ FP/ HRM/ PLN/ PLN-5/ ENG/ Program Planning/ Volunteers/ Organizational Design/ PHI/ INT/.

30. Dufour, Patrice. Le Management des Ressources Financieres. Katuala, Jacques ed. Pittsburgh, PA: University of Pittsburgh; 1983; 358 pp. (Seminaire Francophone en Management du Developpement; Module IV).

One of four modules designed to improve the skills of managers in the development field, especially in Francophone Africa. This is a ten-day course on the management of financial resources. The module contains: an outline of the themes; learning objectives; key concepts presented; a narrative presentation of the concepts in the context of the overall relationship between management and development; and related readings, case studies and exercises.

The text is divided into five segments: the elements of accounting; actualisation techniques; financial and economic analysis; the budget and public finance; and the budgets of public management.

FIN- Shelf.

Course/ Case/ Exer/ Read/ GNL/ FIN/ FIN-1/ FRE/ Fiscal techniques/ Accounting/ Budgeting/ INT/ FAF/ AFR/ CRB/.

31. Dufour, Patrice and Jacques Katuala. Planification et Management des Projets. Jacques Katuala and David Gould ed. Pittsburgh, Pennsylvania: University of Pittsburgh; 1983; 242 pp. (Seminaire Francophone en Management du Developpement; Module III).

This is the third module of a group of four designed to improve the skills of managers of development projects in Francophone Africa. Divided into six segments, this module focuses on project planning and management. The segments address the following: project planning and development; the project cycle; project preparation; the search and negotiation of financing; implementation; and evaluation. Each segment contains learning objectives, and a combination of simulations, cases, and exercises.

PLN-Shelf.

COURSE/ EXER/ CASE/ GNL/ FIN/ PLN/ PLN-3/ PLN-4/ PLN-5/ FRE/ Project development/ Implementation/ Program planning/ Program evaluation/ Health care financing/ FFA/ CRB/ AFR/ INT/.

32. Edgar, Chamorro C.. Chamorro, Edgar. Programa de Salud Materno-Infantil de Banderas (Banderas' Maternal Infant Health Program): INCAE; 1974; 17 pp.

The article is a case dealing with a fictional Central American country. It addresses human resource management problems in a maternal and child health program.

HRM - Human Resource Management.

CASE/ HLTH/ HRM/ SPA/ human resource management/ MCH/ INT/.

33. El-Bushra, Judy; Susan Perl. Family Planning Education in Action: Some Community-Centered Approaches. International Planned Parenthood Federation. Great Britain: Typographic Press Limited; March 1976; c1976; 103 pp; ISBN 0-900924-71-3.

IEC-Shelf.

IEC/ ENG/ CASE/ IDI/ PAK/ KON/ IND/ GHA/ KEN/ NIR/ COL/ DOR/ COS/ HON/ GRB/ LAC/ AFR/ EUR/ ASI/ INT/.

34. Esamah, Willie. Personnel Management. Lagos, Nigeria: Hal Publications; 1985; 111 pp.

This book was designed for use in personnel management courses and to serve as a reference. It is divided into two parts. Part A is a guide to the case study approach. Part B is a compilation of short cases focusing on various aspects of personnel management. Topics covered by the cases include the following: recruitment "selection"; training and development; employee welfare; promotion; performance appraisal; negotiation; conflict resolution; and general personnel management. Questions are included with each case and could serve as the basis for group discussion for a prepared assignment. Although the cases do not have a health emphasis, they do present these issues of personnel management in a Nigerian context, which may be useful to trainers.

HRM- Shelf.

Read/ Case/ GNL/ HRM/ HRM-1/ HRM-3/ HRM-5/ HRM-9/ Eng/ Management, General/ Performance Appraisal/ Conflict Resolution/ Personnel Recruitment/ Personnel Selection/ In-Service Training/ Career Development/ INT/ NIR.

35. Factores Que Desequilibraron a la Economia Durante 1987 (Factors That Destabilized the Economy During 1987): El Comercio; 5 January 1988; 5 pp.

A newspaper account of Ecuador's financial woes, showing how the economy was injured in 1987.

CASE/ GEN/ SPA/ INT/.

36. Family Planning Management Training: Teaching Techniques Workshop. Boston, Ma.: Family Planning Management Training Project, Management Sciences for Health; November, 1987; 400 pp. This is the coursebook for a three day course taught in Colombia on Teaching Techniques for use in the family planning context. The sessions include: case teaching; the case method; oral presentations; the learning process; diagnostic exercise; the case teaching method; visual data and communications; and several cases.

Shelf-Course.

Course/ FP/ TOT/ TOT-1/ TOT-2/ SPA/ Teaching Methodologies/ Case Teaching/ INT/ COL.

37. Flores Cena, Ricardo, and Juan D'Pinto. Acerca del "Metodo de Casos" (About "Case Methods"). School of Industrial Engineering, University of El Salvador: INCAE; 7 pp.

An introduction to the case study, emphasizing that learning is not possible without active participation.

TOOL/ GEN/ SPA/ case study/ INT/.

38. FPMT. Family Planning Management Training Teaching Techniques Workshop. Boston, Massachusetts: Family Planning Management Training Project; 11-13 November 1987; 126 pp.

This is the coursebook for a three day course taught in Colombia on Teaching Techniques for use in the family planning context. The sessions include: case teaching; the case method; oral presentations; the learning process; diagnostic exercise the case teaching method; visual data and communications; and several cases.

Shelf-Course.

COURSE/ FP/ TOT/ TOT-1/ TOT-2/ SPA/ Teaching Methodologies/ Case teaching/ INT/ COL/.

39. Fray, Lionel L. How To Develop A Strategic Plan. Roy A. Lindberg. New York, New York: American Management Association, Extension Institute; 1987; 180 pp.

This is a comprehensive course designed for managers or students who want a self-paced individualized study. Chapters include: The Nature of Planning; A Planning Guide; Planning and Organization; Corporate Planning; Business Unit Planning; Information and Planning; and Developing The Plan. The course consists of text material and four activities to be completed by the reader. These include: instructional programming; an examination; a practice case; and a case that serves as a final examination. This course is oriented towards business and corporate use, but does contain information that is transferrable to a health setting.

STR/PLN-Shelf.

COURSE/ CASE/ EXER/ GNL/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/ Situational Analysis/ Goal Setting/ Objective Setting/ Budgeting/ Mission Statement and Objectives/ Competitive Strategy/ DOM/.

40. Garrucho, Peter D. Asian Social Health Institute Family Center. Manila, Philippines: Asian Institute of Management; 1972; 27 pp.

Note: This case is contained in the AIM Casebook.

This case examines the activities of the Family Center, a community service department formed by the Asian Social Institute in the Philippines. The Family Center operates twenty-five family planning clinics, and "a family life education program which assists families in their religious, social and economic needs through lectures and counseling services." With pressures to increase acceptors exerted through the Population Commission which funds the center's clinic activities, "the officers of the center are reviewing their policies and performance to determine the direction of the center's future activities. The case is supplemented by exhibits that include information on the following: the objective and ideology of the Asian Social Institute; moral aspects of Planned Parenthood; data on the clinical program; statistics; and a budget for the institute. PLN-Shelf.

CASE/ FP/ PLN/ PLN-4/ PLN-5/ ENG/ Religious Groups/ Program Planning/ Family Planning Programs/ PHI/ INT/.

41. Garrucho, Peter D. Commission on Population: Logistics Division. Manila, Philippines: Asian Institute of Management; 1974; 24 pp.

Note: This case is contained in the AIM Casebook which contains other cases on the Philippine Family Planning Program.

This case details the issues confronting the Associate Director of Logistics for the Population Commission of the Philippines. The current logistics cycle is described including procurement, inventory management, transportation, forecasting, and policy issues on specific contraceptive supplies. The Associate Director wants to alter the system to work more effectively. He discusses the problems the program is experiencing with a colleague and outlines some of the possible changes that could be implemented to remedy the problems. Trainers could use this as the basis for a classroom discussion addressing the entire logistic cycle or focusing on specific aspects of the cycle. PLN-Shelf.

CASE/ FP/ LOG/ LOG-1/ LOG-2/ LOG-4/ LOG-5/ ENG/ Logistics Cycle/ Forecasting/ Procurement/ Inventory Management/ Transport/ Pharmaceutical Policy/ Contraceptive Supplies/ Oral Contraceptives/ PHI/ INT/.

42. Garrucho, Peter D. Commission On Population: A Total Development Strategy For The Philippine Population Program. Manila, Philippines: Asian Institute of Management; 1975; 17 pp. Note: This case is contained in the AIM Casebook.

The case focuses on a proposed plan to decentralize the Philippine Population Program and simultaneously integrate the program with development activities at the regional and local levels. The case reviews the major issues posed by this plan. They include: the planning and budgeting process; the organizational system; the role of key personnel; support of local political leadership; training; the management structure; and, monitoring and evaluation. Trainers could use this case as the basis for a classroom discussion or an exercise where participants were required to develop a plan to address the issues raised by the case. Although this case is set in the Philippines, the problems suggested by the case might appear anywhere where such a strategy was being considered.

PLN-Shelf.

CASE/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Community Participation/ Local Governement/ Socio-economic Development/ Integrated Programs/ Budgeting/ Program Planning/ Implementation/ Decentralization/ PPI/ INT/.

43. Garrucho, Peter D. Population Center Foundation Commercial Contraceptive Marketing Program (A and B). Manila, Philippines: Asian Institute of Management; 1975; 27 pp.

Note: This case is contained in the AIM Casebook.

The subject of this two part case is a commercial contraceptive marketing program (CCMP) in the Philippines. In Part A, the program head has set short term objectives for the program and is reviewing his strategy to determine if he has incorporated sufficient activities to meet them. A description of the activities for each program component provides the reader with information to use in examining Part A. In Part B, The Condom Distribution Project has been selected as a component of the CCMP and options for implementing this project are considered. The Program head has just concluded initial negotiations with a large retail distributor and is considering his alternatives.

Information is given on: the goal of the project; the distributors approached by the project head; and the criteria for negotiations between the distributors and the program head. Also included is a description of an earlier experimental project.

Supplementing the case are exhibits on the following: the history of family planning in the Philippines; a comparison of the Commission on Population and the Population Center Foundation; a flow chart for contraceptive distribution; a budget; estimated data on retail outlets in Manila; and a table of price structures. Trainers could use this two part case sequentially when giving a session on retail contraceptive marketing schemes. NB: The AIM Casebook contains another case on this topic called, "The Condom Distribution Project".

PLN-Shelf.

CASE/ FP/ PLN/ PLN-3/ PLN-4/ PLN-5/ PLN-6/ ENG/ Commercial

Retail Sales/Marketing/ Competitive Strategy/ Condom/ Program Planning/ PHI/ INT/.

44. Godisman, Leonard. Centro de Salud Comunitario de San Ramon (San Ramon's Community Health Center). INCAE; a981; 7 pp.

A mostly numeric case study and exercise on a health center and its budget.

FIN - budgeting.

CASE/ GEN/ FIN/ SPA/ INT/.

45. Gordon, Andrew J. and Donald S. Shepard. Village Health Workers in Honduras: A Teaching Case. Boston, MA: Harvard School of Public Health; January, 1983; 57 pp.

Note: 2 copies.

Detailed case that assesses a primary health care program in Honduras. The information and data in the case give the reader an opportunity to review productivity, efficiency, program impact, cost-effectiveness, anticipated recurrent costs and monitoring procedures. As a teaching instrument, the case can be used for a single application such as cost-effectiveness analysis of various program expansion options, or can be used more broadly to assess the entire program. The group could be divided in order to address the various areas of concern. Findings can be given in either a written or an oral form to provide managers with an opportunity to practice presenting and defending proposals. NB: Includes draft notes prepared by a student in response to the case and the assumptions used in calculating a cost-effectiveness analysis. NB: Primary Health Care in Honduras is another case that covers a crisis caused by a lack of funds to pay for recurrent costs for an AID primary health program. The analysis requires looking at alternative financing mechanisms, cost containment, efficiency and productivity measures for hospital construction and development, and new roles for both public and private sector institutions. NB: There is a similar case, The Danfa Project, which focusses on family planning exclusively.

FIN-Resource allocation.

Case/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-3/ Eng/ Cost effectiveness analysis/ Recurrent and fixed costs/ Community Health Workers/ INT/ HON.

46. Ickis, John. El Seguro Social de Cartagua (Cartagua's Social Security): INCAE, reproduction prohibited.; 1973; 24 pp.

The newly appointed head of the family planning section of the social security system in a pseudonymous Central American country attempts to improve the program.

PLN -.

CASE/ FP/ HRM/ PLN/ SPA/ INT/.

47. Ickis, John. Oficina Regional de Cabuya (The Cabuya Regional Office): INCAE; 5 pp.
Note: Trans Olympia Nunez de Vivas, INCAE.
The appointment of a new administrator of a regional office of the Ministry of Agriculture without consulting the social workers provokes employee dissent.
HRM - human resource management.
CASE/ GEN/ HRM/ SPA/ human resource management/ INT/.
48. Ickis, John. San Miguelito II; 23 pp.
A year later the mayor must deal with funds that are drying up, the need for a competent staff, drawing up a municipal budget, the need for urban development and coordinating the system for dependents of the state.
HRM -.
CASE/ GEN/ HRM/ POL/ SPA/ INT/.
49. Ickis, John. San Miguelito III; 17 pp.
San Miguelito is presented as a model city to the foreign press during the forced "11 de Octubre" celebrations but has difficulties with government backlash over the limited autonomy San Miguelito is granted as the result of being declared a model.
HRM -.
CASE/ GEN/ HRM/ POL/ SPA/ INT/.
50. Ickis, John. San Miguelito IV; 4 pp.
The city and federal government must deal with the unexpected resignation of the new mayor and his controversial appointment of a successor.
HRM.
CASE/ GEN/ HRM/ POL/ SPA/ INT/.
51. Ickis, John, and Austin, James. El Comité Técnico de Población: Ejecutando la Política Integral de Población de El Salvador (The Technical Population Committee: Executing the Population Policy of El Salvador). Rizal, Philippines: ICOMP; 1976; 27 pp.
The first part of a case study on an El Salvadoran governmental committee dealing with development attempting to make differing points of view meet.
POL.
CASE/ GEN/ POL/ SPA/ INT/.
52. Ickis, John C. (INCAE). Clínica Santa María. Boston, Massachusetts: The Pathfinder Fund; 1973; 9 pp.
Note: 2 copies. This case is also the eighth of twelve located in the Casebook For Family Planning Management and includes a section on analysis and concepts.
This case describes a family planning program that is being transferred from a private family planning association to the government's Ministry of Public Health. As a result, program operations will change affecting the way in which the supervisor performs his role. The case compares the two systems in each of

the following areas: selection and compensation; supervision; clinic organization; opportunities for professional growth; administrative support; and decision making. The reader is asked to note the specific differences in program operations which will affect the doctor's motivation and to determine which conditions could be improved by effective leadership within the Ministries. Included with the case are a study guide and an analysis.
HRM-Supervision.

CASE/ FP/ HRM/ HRM-9/ ENG/ FRE/ SPA/ Supervision/ Organizational Design/ Decentralization/ Personnel Recruitment/ INT.

53. Ickis, John C. (INCAE). Community Distribution Reports (A and B). Alajuela, Costa Rica; 1986; A-9, B-12 pp.
In these complementary cases, the focus is on the use of data to evaluate a community based distribution program in Latin America. The project supervisor is "responsible for analyzing the plans and reports submitted by the five community workers who report to her, identifying problems in achieving goals and objectives, and taking the remedial actions she deemed necessary." In Case A the supervisor receives a report from one of the community workers that includes seven tables that summarize the data collected by the worker. Trainers could develop a role play with a dialogue between the supervisor and the community worker on the content of the report and the reporting system. In Case B, the project supervisor wants to use the reports of the evaluation section to determine the successes and problems in the provinces she is responsible for, and to try and assess the relationship between promotional activities and contraceptive sales. The tables and reports prepared by the community worker and the evaluation section, are provided for analysis. Trainers could use this to discuss supervision issues in CBD projects and data collection, including the type of data collected, how it is recorded and reported, and its utility in project evaluation. Participants could be asked to prepare a written analysis of the data contained in Case B or to participate in a classroom discussion.
MIS-CBD Records.

CASE/ FP/ PLN/ HRM/ MIS/ HRM-9/ MIS-6/ MIS-2/ ENG/ Supervision/ Logistics/CBD Programs/ Program Monitoring Systems/ Implementation/ Objective Setting/ LAA/ INT/.

54. Ickis, John C., and Austin, James. El Comité Técnico de Población: Ejecutando la Política Integral de Población de El Salvador (The Technical Population Committee: Executing the Population Policy of El Salvador); 4 pp.

A continuation of the above mentioned case study in which the members of the committee attempt to deal with the problems of their growing responsibilities.

POL - population policy.

CASE/ FP/ POL/ HRM/ SPA/ INT/ population policy/.

55. Ickis, John C. Fijacion de Metas en La Trinidad (Stabilization of Goals in Trinidad); 5 pp.

A supervisor of family planning clinics struggles with a means to stabilize the goals for his clinics.

PLN.

CASE/ GEN/ FP/ SPA/ INT/ PLN/.

56. Ickis, John C. Goal Setting In "La Trinidad" / (Target-Setting In La Trinidad). Korten, Francis F. and David C. Korten. Casebook For Family Planning. USA: The Pathfinder Fund; 1974; c1977: p91 - p104; 14 pp.

Note: This case is the fourth of twelve located in the Casebook for Family Planning Management.

This case "focuses on the uses of targets within a national family planning program in Latin America. The author describes a target setting procedure and the difficulties experienced by a regional supervisor in implementing the procedure." The supervisor approaches the overall program director with his concerns and is asked to work out a set of specific recommendations about the target setting system in this situation and to consider how changes might be implemented. The case is introduced with a study guide providing readers with a framework to review the case. Following the case, a thorough analysis of the case elements is presented which discusses the potential and the actual use of targets. NB - this casebook includes another case that focuses on aspects of target setting, entitled, "The Overcrowded Clinic".

HRM-Shelf.

CASE/ FP/ PLN/ PLN-3/ ENG/ SPA/ Target Setting/ LAC/ INT/.

57. Ickis, John C. Los Informes de Distribucion Comunitaria (Community Distribution Reports): INCAE; 1986; 20 pp.

The case study deals with a young woman who is made supervisor of a program to distribute contraceptives and must struggle with inadequate information.

MIS - information.

CASE/ FP/ GEN/ MIS/ information/ SPA/ INT/.

58. Ickis, John C. Morazan y Izaltenango. Chestnut Hill, Massachusetts: INCAE, Pathfinder Foundation; 1974, 1977; 6 pp. (Cases About the Administration of Family Planning Clinics, eds. Francis and Korten).

A case study, using fictional names, of a Latin American country's family planning system.

Case/ FP/ SPA/ INT.

59. Ickis, John C. Morazon & Izaltenango. Casebook For Family Planning Management. Korten, Francis F., and David C. Korten. USA: The Pathfinder Fund; 1973; c1977: p105 - p130; 26 pp. Note: This case is the fifth of twelve in the Casebook For Family Planning Management.

In this case set in Latin America, a comparison of an urban and a rural family planning clinic allows readers to explore the role of performance indicators in evaluating clinic effectiveness. The head of the family planning office has been "given an assignment to make a recommendation for an information system which will reveal how well individual clinics are using their resources in providing services to those who want them." In trying to design the information system, the office head must determine a number of things, including: "for what purposes might performance measures be useful to the program, and; what specific measures would be useful for these particular purposes." The case contains statistical data and a narrative describing the actual situation at each clinic providing the reader with information to make the required recommendation. A study guide introduces the case and serves as a framework for readers as they work through the information. This case has a detailed analysis that looks at each clinic, the use of performance indicators, and the use of data as the basis for managerial action. NB: This book contains another case that could be used after completing this one, entitled, "A Statistical Report for Dr. Vivas." HRM-Shelf.

CASE/ FP/ M&E/ M&E-1/ M&E-2/ M&E-3/ M&E-4/ ENG/ SPA/ Program Monitoring Systems/ Program Evaluation/ Performance Indicators/ Program Effectiveness/ Evaluation/ LAC/ INT/.

60. Ickis, John C. A Proposal for Dr. Texan. Boston, MA: FPMT; 1987; 9 pp.

This case focuses on the dilemmas confronting the director of a family planning association in Latin America. A consultant has been hired to review the association's CBD program and his recommendations for improving the program are presented in the case. The director must determine how to respond to the recommendations, which include a pilot project to train the community based workers and supervisors. Accompanying the narrative section are the following exhibits: current statistics of the CBD program; monthly operating budget of the CBD program; description of the pilot training project; and, suggestions for other ways to improve the program. This case could be used as the basis for classroom discussions or a written analysis. PLN-CBD Programs.

CASE/ FP/ PLN/ PLN-6/ CBD Programs/ Target Setting/ Goal Setting/ Training Programs/ Training Needs/ Budgeting/ LAA/ INT/.

61. Ickis, John C. The Quarterly Count: Administrative Supervision in Community Distribution Program. Boston, MA: FPMT; 1987; 6 pp.

Using a contraceptive community distribution program in Latin America as the basis for this case, the author examines the multiple facets of data collection. On a quarterly visit to a distributor in the program, the promoter discovers some discrepancies in the data collected during the previous quarter. Issues raised by the case include: the role of the supervisor in data collection; inventory control; user follow-up; and, data collection forms. Trainers could discuss how reporting can be used as a supervision tool as well as the techniques used for data collection and reporting.

MIS-Data Collection.

CASE/ FP/ MIS/ HRM/ LOG/ MIS-6/ LOG-5/ HRM-9/ ENG/ Supervision/ Inventory Management/ Data Collection/ Records/ Client Records/ Inventory Records/ LAA/ INT/.

62. Ickis, John C. San Miguelito: INCAE; 1972; 43 pp.

Note: Prepared under David Korten. Revised November 1972.

A man with no previous political experience is made mayor of a newly created municipal district and must create an administrative organization to manage the town.

HRM - political management.

Case/ GEN/ HRM/ POL/ SPA/ INT/ political management/.

63. Ickis, John C. A Supervisor for the Eastern Zone. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1974; c1977: p157 - p168; 12 pp.

Note: This case is the seventh of twelve located in the Casebook For Family Planning Management.

"This short and concise case poses the problem of choosing between two candidates for the position of maternal and child health supervisor" for thirty one rural health units in a central American country. The MCH Director for the country has interviewed both candidates and during the interview each has conveyed his ideas on the role of a supervisor. Based on the background information on the program and the position, and the opinions expressed by each candidate during the interview, the reader is asked to assume the role of the MCH Director and select the better candidate, and to defend his/her selection. The study guide at the beginning of the case provides a list of questions the reader should consider when weighing the selection. In the analysis that follows the case, there is a discussion of some of the characteristics of an effective supervisor, an analysis of the positions stated by each candidate during his interview, and a summary of some of the reasons that less effective individuals often hold supervisory positions. Trainers could use this case as the basis for a comprehensive discussion on supervision.

HRM-Shelf.

CASE/ FP/ HRM/ HRM-9/ ENG/ SPA/ Supervision/ Personnel Recruitment/ LAC/ INT/.

64. International Planned Parenthood Federation. Planned Parenthood and Women's Development - Lessons From The Field. London: Typographic Press Limited; 1982.

This book discusses many aspects of the projects that the Planned Parenthood and Women's Programme has undertaken. "The book is in two parts. The first part presents nine case studies of PPWD projects and describes, in question and answer form, how each project came about, what it did and what it has achieved... The second section discusses what lessons have been learned from the programme as a whole, particularly focusing on the problems which the projects encountered and how these were overcome." Specific issues addressed in this section are: environment; needs identification; strategies; participants; partners; family planning; costs and funding mechanisms; problems and constraints; and, assessment and monitoring. The case studies are from the following countries: Costa Rica; Jamaica; Egypt; Indonesia; Bangladesh; Kenya; Lesotho; Sri Lanka; Tunisia. Trainers could use the cases presented in the book to illustrate how family planning projects can be integrated with other development goals. PLN-Program Cycle.

CASE/ READ/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Policy Environment/ Women's Programs/ Integrated Programs/ Project Development/ Family Planning Programs/ Program Planning/ Needs Assessment/ Problem Indicators/COS/ JAC/ EGY/ IND/ BAN/ KEN/ LES/ SRL/ TUN/ INT/.

65. Jacome, Edgar S. The Supervision of Lidia. Boston, MA: FPMT; 1987; 6 pp.

In this case, a promoter working for a CBD program in a Latin American country struggles with the barriers that affect her ability to perform her job effectively. A consultant, assigned to "identify the unique features of successful CBD programs" for his own organization, observes the promoter as part of his research. The issues raised include: supervision and support of CBD personnel; communications; flexibility of protocols and policies; user demand and perspective; and, incentives and disincentives. The case can be dissected taking the perspective of the program director, the consultant, or the promoter, and could even be adapted to be a role play exercise to illustrate the complex issues faced at the different levels of service delivery.

PLN-CBD Programs.

CASE/ FP/ HRM/ HRM-9/ PLN/ PLN-6/ ENG/ CBD Programs/ Operations Planning/ Supervision/ Program Planning/ Service Delivery Systems/ Interpersonnal Communications/ Incentives and Disincentives/ LAA/ INT/.

66. Jacome, S. Edgar. Martha Torres. Boston, MA: FPMT; 1987; 4 pp.

This case presents numerous issues of human resource management that arise in a community based distribution program in Latin America. During her tenure, a motivator in the program works under two different supervisors. Issues are raised about community involvement in CBD programs. The case could be used as the basis for a classroom discussion or to perform a written analysis.

HRM-Supervision.

CASE/ FP/ PLN/HRM/ PLN-6/ HRM-9/ ENG/ Program Planning/ Supervision/ CBD Programs/ Personnel Recruitment/ LAA/ INT/.

67. Korten, Frances F. and David C. Casebook for Family Planning Management-Motivating Effective Clinic Performance. Boston, Massachusetts: The Pathfinder Fund; 1977; 338 pp.

Note: The Spanish edition of this book is currently out of print. This comprehensive casebook was developed to improve the effectiveness of management of family planning programs. "It is divided into three parts, each including a combination of conceptual materials, case problems, and case analyses. Part I focuses on the question, "what difference can management make?"...Part II looks in more detail at how management can stimulate more effective work from the operating personnel" and presents management tools to use in order to achieve this. Part III discusses the interrelationship of management tools and development strategy. Twelve cases are included in the text addressing a variety of issues affecting clinic performance including: supervision; data collection; training; and performance feedback. This book can be used for individual self-study, self-directed group study, or informal classroom use.

HRM-Shelf.

CASE/ READ/ FP/ PLN/ HRM/ HRM-1/ HRM-2/ HRM-3/ HRM-9/ HRM-10/ PLN-3/ PLN-5/ PLN-6/ ENG/ SPA/ Supervision/ Management Functions/ Target Setting/ Goal Setting/ Management Style/ Organizational Design/ Organizational Development/ Workplans/ Clinic Efficiency/ Patient Flow Analysis/ BB/ RTI FRE/ INT/.

68. Korten, Francis F. A Statistical Report for Dr. Vivas. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1976; c1977: p131 - p156; 26 pp.

Note: This case is the sixth of twelve located in the Casebook For Family Planning Management.

This case uses information and data collected by seven family planning clinics to illustrate the importance of presenting data in a usable format. The head of a family planning program in Latin America "has just received his first quarterly report under a new system and is frustrated by his inability to determine from the data how well each clinic is functioning or what might be done to improve performance." The reader is asked to take the data presented and to rearrange the tables in such a way that clinic performance will be more clear, and to indicate for each clinic the types of follow-up action the program head can take in

order to improve performance. Trainers can use this case as the basis for a comprehensive exercise combining the design of data reporting systems and how to effectively use the information contained as a management tool. NB: This case follows another case exploring the role of performance indicators in evaluating clinic effectiveness entitled, "Moraza and Izaltenango". The cases can be used in conjunction with one another.

HRM-Shelf.

CASE/ EXER/ FP/ MIS/ M&E/ M&E-4/ MIS-6/ ENG/ SPA/ Program Effectiveness/ Program Monitoring Systems/ Program Evaluation/ LAC/ INT/.

69. Korten, Francis F., David C. Korten and Dierdre Strachan. The Valdivian Family Planning Program. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1976; c1977: p281 - p332; 50 pp.

Note: This case is the twelfth and final case located in the Casebook For Family Planning Management.

This case synthesizes the discussion of the four major management tools addressed throughout the book - targets and performance feedback, supervision, training, and organization. In this case, "the Head of the National Family Planning Program in a Latin American country is holding a meeting with his central office staff. It is one of a series of meetings to review the program operations and determine changes needed to improve program performance. In the meeting, the central office staff are discussing the performance of the clinic and promotional personnel. Their discussion, together with the background information in the case, provide [ample] data on both the program's current motivational climate and the managerial factors creating it." The reader is asked to "diagnose the current problems and to make recommendations for program improvement. Trainers could use this case to conclude a comprehensive training program on organizational design and human resource management. As a final course project, participants could participate in a group discussion or prepare a written analysis and list of recommendations.

HRM-Shelf.

CASE/ FP/ HRM/ HRM-3/ HRM-9/ HRM-10/ ENG/ SPA/ Organizational Development/Supervision/ Reorganization/ Performance Appraisal/ In-service Delivery/ Target Setting/ LAC/ INT/.

70. Lagman, Professor Oscar P. Jr. Office Of Health Education And Personnel Training. Manila, Philippines: Asian Institute of Management; 33 pp.

Note: This case is contained in the AIM Casebook.

In an effort to improve the effectiveness of the motivators in the Philippine population program, the Project Director for Personnel training is reviewing the objectives and the content of the training. The existing program is described briefly, including a summary of qualifications that must be met by the motivators in order to fill the role. Attached to the case are sample course syllabi that have been used for previous programs.

Trainers could use this case to have participants plan a new course for motivators, or to perform an analysis on the training program.

PLN-Shelf.

CASE/ FP/ TOT/ PLN/ HRM/ TOT-2/ PLN-4/ ENG/ Staff Development/ In-Service Training/ Curriculum Development/ Course Design/ PPI/ INT.

71. Leenders, Micheal R., and James A. Erskine. Case Research: The Case Writing Process. 2 ed. Canada: Research and Publications Division: School of Business Administration, The University of Western Ontario; 1978; c1978; 162 pp.

"The focus of this book is on the case writing process. The purpose of this book is to provide information for those who wish to write cases but have no prior experience." The information covered has two main parts. The first represents the current state of the art. "The second part is an analysis of current practice with a view towards identifying potential areas of improvement that will contribute to increased case research effectiveness in the future." The book contains thirteen chapters covering the following topics: the case method; case origin; data collection; the case writing process; release statements; teaching notes; current trends and future developments; and, the mini-case. The book would serve trainers as a comprehensive guide to the case writing process.

TOT-Shelf.

READ/ CASE/ GNL/ TOT/ TOT-1/ ENG/ Teaching Methodologies/ Case Writing/ RTI/ BB/ INT/.

72. Leguzman, Francisco. La Corporacion Agricola Tamaulipeca (The Tamaulipeca Agricultural Organization); 3 pp.

A case study of an overly diversified corporation attempting to consolidate its purchasing.

POL.

CASE/ GEN/ POL/ SPA/ INT/.

73. Lindenberg, Marc, Benjamin Crosby. Managing Development: The Political Dimension. West Hartford, CT: Kumarian Press; 1985; 217 pp.

"The purpose of this book is to help development managers improve their capacity to understand and perform managerial roles, in particular those which require skills in political analysis and strategy design." Using a combination of conceptual text, case studies and case analysis, the book is designed "to help managers become more successful negotiators, representatives, coordinators, advocates and strategists." Divided into three parts, the book proceeds from principle to practice. Part I, "The Role of the Manager and Political Analysis", details the work of development managers, and the political roles they play. The political analysis process is discussed, followed by the design and implementation of an appropriate and effective strategy. In Part II, "The Manager and the Domestic Political Environment", a set of case studies are presented for analysis.

Study questions are provided, as is an analysis prepared by the authors. In Part III, "Managerial Strategy and International Pressure", the authors describe the additional concerns faced by managers when international "actors" become part of their political environment. Written as a text, trainers can use this book as the basis of a course, or they could use the cases and analysis as a course component.

POL-Shelf.

READ/ CASE/ HLTH/ POL/ POL-3/ HRM/ ENG/ Policy environment/
Political factors/ Government/ Organizational development/
Resistance to change/ Policy development/ INT/ BB.

74. Lopez, Mario Antonio G. Dwijaya Mail-Order Condoms. Manila, Philippines: Asian Institute of Management; 1979; 12 pp.

Note: This case is contained in the AIM Casebook.

This case reports on an experimental mail-order condom distribution project conducted in Indonesia. The origins and the experimental process are described including a discussion of some of the problems that were experienced. The case concludes with a series of questions posed by someone reviewing the project. The questions raise issues about the design and the evaluation of the experiment. Trainers could use this as the basis for a classroom discussion on project design.

PLN-Shelf.

CASE/ READ/ FP/ PLN/ PLN-6/ PLN-5/ ENG/ Project Development/
Condom User Perspective/ Service Delivery Systems/ Performance
Indicators/ IND/ INT/.

75. Management Sciences for Health. Financing Health Care in St. Jerome Islands. Boston, MA: Management Sciences for Health; 1984; 14 pp.

Carefully constructed four-part case that examines the various ways to generate funds for health services on the islands of St. Jerome. It is designed to allow participants to develop an understanding of the range of methods available to generate funds and to learn to utilize criteria to evaluate these methods.

Included in the case are a trainer's guide and a session guide, and a series of questions for written and/or verbal response.

FIN- Revenue Generation.

Case/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-3/ Eng/ Mobile units/ Fee for
services/ Health care financing/ Recurrent and fixed costs/
Capital and variable costs/ Income generation/ Drug procurement
financing/ INT/ CRB.

76. Managing a Management Development Institution. Geneva, Switzerland: International Labour Office; 1982; 277 pp. (Milan Kubr. Management Development Series; No. 18).

This book was written for anyone involved in designing, planning, managing, and supervising management development institutions. Part I includes chapters on: strategic planning and management links with the environment; recruiting and developing personnel; organizational development and program planning and control. Part II contains four case studies of management institutes in Geneva, Ireland, India, and Venezuela.

Shelf-HRM.

READ/ CASE/ GNL/ HRM/ HRM-1/ HRM-9/ HRM-10/ ENG/ Staff Development/ Organizational Development/ Supervision/ Personnel Recruitment/ INT/ VEN/ IDI/ IRR/ SWI/ BB2/ RTI.

77. Mayo-Smith, Ian. How Can We Keep Our Staff?: The Bokondo Ministry of Works Case. Managing People: Five International Cases; 1983.

This easily read case deals with questions of manpower requirements, supply, and development. In a fictitious country, the Head of Personnel for the Ministry of Works and Finance is having difficulty in recruiting and retaining professional staff due to a number of factors described in the case. The reader is asked to detail some possible solutions to the problem. NB: This case is also contained in a case book, "Managing People: Five International Cases".

HRM-Planning (Manpower).

CASE/ GNL/ HRM/ HRM-7/ ENG/ Manpower planning/ Manpower requirements/ Manpower supply/ Career development/ INT/ AFR.

78. Mayo-Smith, Ian. Managing People - Five International Case Studies. 2 ed. West Hartford, CT: Kumarian Press; 1983; pp 25. The cases contained in this book are based on actual events in five different countries. They deal with a wide variety of personnel management problems in the context of organizations in developing countries. NB: Each case was individually abstracted. To see the abstract you can do a search by the author's name.

HRM-Shelf.

CASE/ GNL/ HLTH/ HRM/ HRM-1/ HRM-8/ HRM-7/ HRM-9/ HRM-10/ ENG/ Supervision/ Management style/ Personnel procedures/ Remuneration systems/ Operating procedures/ Women/ Cross cultural management/ Manpower supply/ Manpower planning/ Manpower requirements/ Career development/ Managing conflict/ Staff development/ INT/ AFR/.

79. Mayo-Smith, Ian. Men's Work and Women's Worth: The British Toy Factory Case. Managing People: Five International Studies; 1983.

This case describes a small manufacturing company in the United Kingdom which employs more than 50% women who on average receive about 40% lower salaries than the male employees. The case looks at the issues raised by this disparity and the criteria used to establish the existing pay scale. New criteria are proposed and the reader is asked to assess them and determine what other alternatives might exist. The reader then must decide how this affects sex bias within the organization, and to use the criteria to evaluate a position within the organization. The case allows the reader to analyze the situation and to get some practice in applying criteria to determine remuneration. NB: This case is also contained in a case book, "Managing People: Five International Case Studies".

HRM-Remuneration systems.

CASE/ GNL/ HRM/ HRM-8/ ENG/ Remuneration systems/ Operating procedures/ Personnel procedures/ Women/ INT.

80. Mayo-Smith, Ian. Private Lives and Official Duties: The UNARD Case. Managing People: Five International Studies; 1983: pp. 4-7.

This clearly laid out case focuses on various personnel issues faced by a chief personnel officer on a site visit to a fictitious U.N. rural development project in the Caribbean. The reader is asked to identify the central issues in the case, which includes questions as to whether a project official's private life is interfering with his official assignment. The reader is then asked to draft some policy guidelines for Project Managers in the field to guide them in this kind of case. NB: This case is also contained in a case book; "Managing People - Five International Case Studies".

HRM-Supervision.

CASE/ GNL/ HRM/ HRM-9/ HRM-8/ ENG/ Supervision/ Management style/ Personnel procedures/ INT/ LAC.

81. Mayo-Smith, Ian. The Problems of a Supervisor: The District Health Center Case. Managing People: Five International Case Studies; 1983.

This clearly written case describes a district health center on a fictitious Caribbean island. Background is given on the center and the personnel employed there, followed by a description of events that highlight the need to develop the supervisory skills of the personnel. There are also issues raised by the fact that one of the supervisors is female and she is responsible for a male staff. NB: This case is also contained in a casebook, "Managing People: Five International Case Studies".

HRM-Supervision.

CASE/ HLTH/ HRM/ HRM-10/ HRM-1/ ENG/ Supervision/ Managing conflict/ Staff development/ Managing style/ INT/ LAC.

82. Mayo-Smith, Ian. Who's Practising Discrimination?: The Makuta Recruitment Case. Managing People: Five International Case Studies; 1983.

Drawn from a situation in a fictitious West African country, this case focuses on issues of organizational design, recruitment, and personnel policy. The country has implemented a law, designed to encourage citizens, who have travelled overseas to study, to return to the country and accept appointments in the civil service. The application of this law in an individual case raises issues about discrimination on ethnic grounds, and about the hierarchy of the design making process within the Ministry described here. NB: This case is also contained in a casebook, "Managing People: Five International Case Studies".

HRM-Policies.

CASE/ GNL/ HRM/ HRM-6/ HRM-7/ HRM-9/ Operating procedures/
Personnel procedures/ Cross cultural management/ Manpower supply/
INT.

83. Mayo-Smith, Ian and Nancy Ruther. Managing Information - International Case Studies. West Hartford, Connecticut: Kumarian Press, Inc.; 1987; 54 pp.

Note: This casebook comes with a 16 page companion workbook entitled, "Notes for Case Leaders," which "provides trainers with suggestions and ideas for use of the cases".

This is a casebook containing five different cases "intended to be used in a classroom setting to stimulate discussion of important issues in information management or to form the basis for practical exercises. The separate "Notes for Case Leaders" suggest some ways in which the cases can be used and give some pointers as to the issues to be considered."

MIS-Shelf.

CASE/ EXER/ GNL/ MIS/ ENG/ INT/ BB2.

84. McCaskey, B. Marco de Referencia para el Analisis de Grupos de Trabajo (A Framework for the Analysis of Work Groups). Translation by Athos, Anthony and Barrett, Diana: INCAE; 1987; 27 pp.

Note: Article (c) 1979 by the President and Fellows of Harvard College.

The article observes "work groups" from an administrative point of view. A case study (Corporacion El Merito - The Merit Corporation, revised version of the original by Anthony Athos and Diana Barrett) is included and the article analyzes it as an example.

HRM - group dynamics.

CASE/ TOOL/ GEN/ HRM/ SPA/ INT/ group dynamics/.

85. McCaskey, Michael B. A Framework for Analyzing Workgroups. Cambridge, MA: Harvard Business School; 1979; 9-480-009; 27 pp. This case looks at groups from a managerial viewpoint. It focuses upon the features of group behavior important to the manager who wants to understand how to manage a group for increased effectiveness. The case asks the reader to analyze the workgroup by looking at each of the following: context; people; task requirements; formal organization; group culture; and outcomes. The case is presented sequentially, allowing the reader to assess these features over a period of time in order to determine which management techniques might affect the behavior of the group. This case is designed to serve as the basis for classroom discussion.

HRM- Management of Groups.

Case/ GNL/ HRM/ HRM-1/HRM-10/ ENG/ Management, General/ Management of Groups/ Conflict Resolution/ Management Style/ Team Building/ INT.

86. McCaskey, Michael B. Una Estructura para Analizar Grupos de Trabajo (A Framework for the Analysis of Work Groups): INCAE; 1987; 31 pp.

Note: translated by Rolando Hernandez under Francisco LeGuzman in 1987; original article by the President and Fellows of Harvard College in 1979.

The article observes "work groups" from an administrative point of view. A case study (Coporacion El Merito - The Merit Corporation, revised version of the original by Anthony Athos and Diana Barrett) is included and the article analyzes it as an example.

HRM - Work Groups.

TOOL/ CASE/ GEN/ HRM/ SPA/ work groups/ INT.

87. (Harvard University). Mini-Case. Cambridge, MA: Harvard University; 1 pp.

This one page case description is written to challenge the problem solving skills of the reader. In this "mini-case," a dentist has been assigned to a Provincial general Hospital by the M.O.H. The dentist has a serious problem with the Program Director and the reader is asked to develop a strategy to solve this problem. The situation described reflects both the difficulties that can be posed by the structure of the health care system in developing countries, and those experienced by any employee with a poorly functioning manager.

HRM-Problem Solving.

CASE/ HLTH/ HRM/ HRM-1/ HRM-9/ ENG/ Problem Solving/ Resistance to Change/ INT.

88. Mitchell, Marc, M.D., M.B.A. (Management Sciences for Health). Workshop on Management for Health Administrators; August 10-11 1987; 8 pp.

This serves as the framework for a two day training session on planning, implemetation and monitoring. In day one there is a case study of the problems faced by a new Director-General of health in a fictitious African country. The case is presented, followed by a list of discussion questions. In the second session there is an outline for a teaching session on planning, implementation and monitoring which emphasizes the linkages between these processes and some of the common problems with each.

PLN- Program Cycle.

CASE/ COURSE/ HLTH/ PLN/ PLN-5/ PLN-4/ ENG/ Program Planning/ Implementation/ Program Evaluation/ Program Monitoring Systems/ INT/.

89. Nickerson, Clarence B. Control Presupuestario (Budget Control). INCAE - restricted distribution: McGraw-Hill Co, NY; 1962; 17 pp. (Managerial Cost Accounting and Analysis Text). The article deals with various means of developing a budget (fixed and variable) through the means of a case study about a children's summer camp.

FIN - budget.

CASE/ GEN/ FIN - budget/ FIN/ SPA/ INT/.

90. Overholt, Catherine; Mary B> Anderson, Kathleen Cloud, and James E. Austin. Gender Roles in Development Projects: A Case Book. West Hartford, CT: Kumarian Press; c1985; 326 pp; ISBN 0-931816-15-7.

PLN-Shelf.

CASE/ PLN/ ENG/ IND/ TAN/ KEN/ PER/ IDI/ INT/.

91. PACT (Private Agencies Collaborating Together). Monitoring and Evaluating Small Business Projects: A step by step guide. U.S.A.: Editorial PKG.; c1987; 262 pp; ISBN 0-942127-00-5. Written for private development organisations this manual covers aspects of strategic planning, operations planning and program monitoring and evaluation. The authors use a clear systematic approach with a master plan worksheet format that takes readers through each step of the process. Illustrative scenarios or mini-cases provide readers with an opportunity to assess problems and using the worksheet, to develop a rationale and strategy to correct them. The eight steps discussed are: 1) Defining small business; 2) defining your small business assistance program; 3) defining your purpose; 4) choosing economic indicators and tools; 5) choosing social indicators and tools; 6) choosing indicators that monitor your effectiveness; 7) managing your plan; and 8) using the information. While the focus of this manual is small business projects, there are many sections relevant to family planning projects in developing countries. NB: The book contains two case studies illustrating how different agencies have developed international monitoring and evaluation systems that

work for them. They are Foster Parents Plan International, Mindoro, Philippines; and Partnership for Productivity International.

M&E-Shelf.

READ/ MAN/ CASE/ GNL/ M&E/ PLN/ M&E-1/ M&E-2/ M&E-3/ PLN-1/ PLN-2/ PLN-3/ PLN-5/ ENG/ Program Evaluation/ Program Effectiveness/ Strategic Planning/ Mission Statement and Objectives/ Project Development/ INT/.

92. Paxman, John and Jean Georges Dehasse. Le cas des centres de PMI desertes; 2 pp.

This short case was adapted from the English by Jean Georges Dehasse and focuses on the skills involved with problem solving. A nurse/midwife who oversees four PMI centres in the fictitious country of Dohran. She is confronted with very low utilization rates for the centers despite a high birth rate. She must analyze the problem and propose solutions. The case is accompanied by questions. NB: The English version (The Empty Maternity) is also accompanied by a very detailed analysis. There is a supplement (in English) to this case based on real-life experience of a Nigerian participant confronted with this problem. The case has also been used in conjunction with role play (acting out the case).

HRM- Problem Solving.

CASE/ FP/ HRM/ HRM-1/ HRM-9/ FRE/ Problem Solving/ Supervision/ Haiti/ INT/.

93. Paxman, John M. (FPMT/Pathfinder Fund). The Empty Maternity. Boston, MA: Management Sciences for Health; 1987; 6 pp.

This short case focuses on the skills involved with problem solving. A nurse-midwife who oversees four maternity centers in an African district, is confronted with very low utilization rates for the centers, despite a high birth rate in the district. She must analyze the problem and propose solutions. The case is accompanied by questions and a very detailed analysis which includes supplemental information. Trainers could use the information contained in the analysis as the framework for a group discussion on problem solving.

HRM-Problem Solving.

CASE/ FP/ HRM/ HRM-1/ HRM-9/ ENG/ Problem Solving/ Supervision/ AFR/ INT/.

94. Pyle, David F. Indonesia: East Java Family Planning, Nutrition, and Income Generation Project: Kumarian Press; 1984; 27 pp.

This case provides a comprehensive look at an integrated project in Indonesia that combines family planning, nutrition, and income generation. Background is given on the country and the project, followed by a discussion of the culture and the role of women in Indonesia. The design, implementation, and progress of the project are described and supplemented by a series of tables. The reader can then use the material to assess whether the program is meeting the objectives, if further monies should be

provided, and whether the program should be expanded.
FIN- Revenue Generation.

Case/ FP/ FIN/ FIN-2/ FIN-3/ Eng/ Family planning/ Income
generation/ Women/ INT/ IND.

95. Ramirez, Julio Sergio. El Manejo de una Sesión de Clase por el Método de Casos (Conducting a Class Session with the Case Method): INCAE; 19 pp.

The author gives guidelines to the effective use of case studies in class so as to present them without the class discussion fragmenting and the teacher's and case points being lost in the process. Deals with the content of the case vs. the process, stimulating discussion without providing too much guidance and dealing with the problem.

IEC -.

TOOL/ GEN/ adult education/ case studies/ SPA/ INT/.

96. Reyes, Alejandro A. Bali (B). Manila, Philippines: Asian Institute of Management; 1978; 15 pp.

Note: This case is located in the AIM Casebook.

This case reports on changes implemented in the Balinese family planning program between late 1974 and 1977. Background information is provided on the Indonesian program and on the organization responsible for family planning in the country, the BKKBN. The village system is described, as is the rationale for using this system for the family planning program. Following these introductory sections, the author reports on how the village system is being implemented and the results to date. Tables and charts supplement the text. Trainers could use this case in tandem with Bali (A), written by Felipe B. Alfonso.

PLN-Shelf.

CASE/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Service Delivery Systems/
Vertical Family Planning Programs/ Community Participation/ IND/
INT/.

97. Reynolds, John I. Case Method In Management Development - Guide For Effective Use. Geneva, Switzerland: International Labour Office Geneva; 1980; 264 pp. (Management Development Series; No. 17).

"This is a practical guide to the more effective use of the case method in the total process of developing managerial skills." Divided into four main sections plus appendices, the guide has several purposes. Part I is written to introduce students to the case method of teaching. Parts II - IV focus on trainers, providing them with information on using this method of teaching and writing new cases. The appendices include eleven cases, a sample case evaluation form, and a selected bibliography.

Shelf-TOT.

READ/ CASE/ TOT/ TOT-1/ ENG/ Case Teaching/ Case Writing/ INT/
BB2/ RTI.

98. Roberto, Eduardo L. The Condom War of 1975 (A) and (B). Manila, Philippines: Asian Institute of Management; 1978; 19 pp. Note: This case is contained in the AIM Casebook which contains other cases on the Philippine Family Planning Program. A planned boycott of retail stores selling condoms raises issues that are the focal point of this two part case set in the Philippines. The Population Center Foundation (PCF) is being blocked in its efforts to conduct a Condom Project by the powerful Catholic Women's League. In Part I, background information is given on the pivotal organizations and on the planned boycott. The reader is asked to assume the role of the project director of the Population Center Foundation, and to develop a strategy to resolve the problem effectively. Trainers could use Part I to discuss the variety of options that exist when managers face politically charged programmatic decisions. A role play exercise could be developed to draw out the positions of the different groups. In the second part of the case, the director of the Population Foundation meets with the national president of the Catholic Women's League (CWL) to discuss the proposed boycott. The project director for the PCF discusses the controversy step by step, making recommendations to the president of the CWL as to how to avert a confrontation. After the meeting has concluded, the PCF project director reports to the executive director and is asked to prepare a "written analysis of the implications of all those recommendations on the condom distribution project in the coming months." The recommendations contained in Part II illustrate some of the ways in which the PCF tries to retain their overall objectives, but makes compromises in the strategy used to attain these objectives.

PLN-Shelf.

CASE/ Role Play/ FP/ POL/ POL-4/ ENG/ Family Planning Policy/ Policy Environment/ Political Factors/ Community Participation/ Group Relations Public Opinion/ Religion/ Social Institutions/ PHI/ INT/.

99. Roberto, Eduardo L. (International Committee on the Management of Population Programs). Research Utilization In The Philippines Population Program. Manila, Philippines: Asian Institute of Management; 24 pp.

Note: This case is contained in the AIM Casebook.

In this case, the associate director for the Planning Division at the Philippine Population Programme is trying to design the research program for the organization. Background details on the organizational structure and the history of the division provide a sense of the problems the director faces in trying to assign research priorities, and determining how to accommodate a research utilization component in the research program. Five exhibits accompany the case, Included are two organizational charts, a flow chart for processing research proposals, and two narratives on the utilization of research findings.

PLN-Shelf.

CASE/ FP/ PLN/ M&E/ PLN-1/ PLN-4/ PLN-5/ ENG/ Program Planning/ Operations Planning/ Strategic Planning/ PPI/ INT/.

100. Segall, Ascher J., M.D., and Hannelore Vanderschmidt, Ruanne Burglass, Thomas Frostman. Metodo para disenar cursos en la ciencias de la salud. Center for Educational Development in Health. Harvard School of Public Health. Mexico: Editorial Limusa; 1978; c1978; 387 pp; ISBN 986-18-0030-3.

"Written to assist health care professionals lacking teaching experience, this manual is a guide to course design. Based on the most recent pedagogical techniques, various step by step models for course design are presented. The methodology was developed and tested by teachers from the Harvard School of Public Health. The manual provides a method for establishing teaching objectives based on a detailed analysis of the job responsibilities of a health care professional. The book includes a series of mini cases to aid in self teaching, as well as guidelines for evaluating both student progress and teacher self-evaluation. References, cross references and an index facilitate the search for specific items."

TOT-Shelf.

MAN/ READ/ CASE/ HLTH/ TOT/ TOT-2/ SPA/ Teaching Methodologies/ Curriculum Development/ Course Design/ BB/ INT/.

101. Segall, Ascher J., M.D., Dr. P.H., Hannelore Vanderschmidt, Ph.D., Ruanne Burglass, Sc.D., Thomas Frostman, M.P.H. Systematic Course Design for the Health Fields. Boston, MA: Boston University, Center for Educational Development in Health; 1982; 220 pp.

This book presents a systematic approach on curriculum design for the health fields. It can be used as a basic text and as a guide to course design for trainers working alone or as a team member. The book is divided into four major units: A. Overview of the Course Design Model; B. Implementation Problems, including mini-cases and practice examples; C. Methods and Techniques used in implementing the course model; and D. Supplements that include step by step guidelines for performing each task in the course model and examples.

TOT-Shelf.

COURSE/ EXER/ TOOL/ HLTH/ TOT/ TOT-1/ ENG/ SPA/ Adult education/ Case teaching/ Teaching methodologies/ Curriculum development/ Course design/ Competency based training/ RTI/ INT/ BB.

102. Seims, Sara and Ken Heise (Family Planning Management Training Project). Kazanda Case. 1 ed. Boston, Massachusetts: Management Sciences for Health; 1987; 11 pp.

Case based on composite data from French-African programs public sector family planning program in a low contraceptive-prevalence country. The case presents a wide variety of management issues/problems and is a rich source for discussion. However, the case discussion needs to be structured. Short note on use of case included.

HRM-Management (General).

CASE/ HRM/ HRM-1/ HRM-2/ HRM-3/ HRM-4/ ENG/ FRE/ FP/ Family planning programs/ Public sector programs/ Implementation/

Access/ Planning/ Management, General/ FAF/ INT.

103. Sheldon, Alan (Ministry of Public Health, Government of Kuwait). Implementing the Problem Oriented Medical Record. Cambridge, MA: Harvard University; 1979; 8 pp.

This case discusses the implementation of an innovative medical record system. Appendices to the case illustrate the existing system and the proposed system. The reader is asked to analyze the barriers to implementing this change, as well as developing a strategy to manage the change. While the record system involved is not directly applicable to family planning, the concepts demonstrated by the case are relevant in any health setting. The case could also be adapted to more closely mirror the family planning delivery and record keeping systems.

HRM-Management of Change.

CASE/ HLTH/ HRM/ HRM-4/ ENG/ Management of change/ INT.

104. Sheldon, Alan (Ministry of Public Health, Government of Kuwait). The Introduction of Comprehensive Nursing Care in Kuwait. Cambridge, MA: Harvard University; 1979; 7 pp.

The subject of this case is the introduction of a new system of comprehensive nursing care in Kuwait. The concepts covered include: the management of change; reorganization; staff development; altering job descriptions; and new policies. In addition to the narrative, the appendices include: a statement on the philosophy and organization for comprehensive nursing care; and the nursing care plan.

HRM-Reorganization.

CASE/ HLTH/ HRM/ HRM-4/ ENG/ Management of Change/ Organizational Development/ Staff Development/ Job Description/ INT/ KUV.

105. Shepard, Donald. with the research assistance of George A. Mensah. The Danfa Project. Boston, MA: Harvard School of Public Health; February, 1983; 12 pp.

This case focuses on a project in Ghana that was designed to determine the best method to deliver family planning services. The project delineated four geographic areas, each one having a different mix of the following services: comprehensive health care; health education; family planning; and standard MOH services. Information and data furnish the reader with the information necessary to complete the attached assignment. The assignment asks the reader to give outcome indices that can be used in analyzing family planning interventions (eg: births averted); calculate costs and effectiveness; consider what outputs from the project should be considered for policy development; and assess how the characteristics of the four areas studied may bias the result. Finally the reader is asked to recommend an approach for family planning programming in Ghana based on various criteria and to determine how that recommendation would be altered if funds were unlimited and if funds were very limited. NB: There is a case on Village Health Workers in Honduras that covers many aspects of resource allocation.

FIN- Resource allocation.

Case/ FP/ FIN/ FIN-2/ Eng/ Cost effectiveness analysis/ Resource allocation/ Service delivery systems/ GHA/ INT.

106. Shulman, James S. El Aprendizaje por el Metodo de Casos (Learning through the Case Method): Northeastern University; 1967; 5 pp.

Note: translated into Spanish by INCAE in 1970.

An introduction to the benefits of case studies as opposed to lectures.

Case Studies.

TOOL/ GEN/ SPA/ case studies/ INT/.

107. Silvo, Franco. PROPLAF Case. Boston, Massachusetts: Family Planning Management Training Project; March, 1987; Regional Training Institute report, March 1987; 10 pp.

Note: This is a series of Overheads.

This is a general Family Planning Management case used as an actual case in FPMT's training of trainers workshop to demonstrate how to use a case method. This is a complete set of overheads providing all the information needed to present the case. There are no teaching notes.

HRM-General Management.

CASE/ FP/ HRM/ MIS/ ENG/ Management/ Management information systems/ Organizational design/ INT.

108. Siy, Robert Y. The Family Planning and Rural Development Associates; 1984; 21; pp.

This case provides an interesting and detailed description of the history and evolution of a very successful and innovative family planning program in Southeast Asia (Thailand). The case is designed to introduce students to the process of goal setting, strategy formulation and implementation. It also emphasizes the competing concerns and trade offs that managers may face in regards to long-term and short-term goals and the economic viability of an organization. The author describes the various programmatic decisions made during the one and a half decades that the organization has provided family planning services. This includes a description of the various activities that the organization has expanded to include, and how they are administered. In the final pages of the text, the author describes how the director is faced with a pivotal decision to accept donor funds to provide services unrelated to family planning. The reader is then asked to analyze the decisions made and to determine strategies and priorities for the next decade. The case includes a number of organizational diagrams and seven pages of teaching notes which should help trainers when presenting the case. Trainers could readily supplement the teaching notes in order to address additional issues in strategic and program planning. NB: This case is also located in the A.I.M. Casebook.

PLN-Strategic Planning.

CASE/ FP/ PLN/ PLN-1/ PLN-2/ PLN-3/ ENG/ Strategic Planning/ Goal

111. Soriano, Emily P., under supervision of Peter D. Garrucho Jr. Commission of Population: Regional Population Office (B). Manila, Philippines: Asian Institute of Management; 1976; 25 pp. Note: This case is contained in the AIM Casebook which contains other cases on the Philippine Family Planning Program. In this case a Regional Population Officer in the Philippines is assessing the performance and the direction of the programs he is responsible for. A description is provided for each of the operational activities of the population office, detailing some of the current initiatives and some of the barriers affecting successful implementation of activities. The barriers identified include inadequate manpower and workspace, and difficulties in coordinating the efforts of the cooperating agencies participating in family planning activities. The Regional Officer feels that in spite of these problems, staff morale and motivation were still high. In assessing the situation, the Regional Officer is trying to determine if the activities of the Regional Population Office are contributing effectively to achieving the population objectives for the region and if he had defined the key tasks for accomplishing his Regional Population Office objectives. This case also touches on organizational design and participative management techniques. The case is supplemented by extensive data including: organizational charts; budgets; job descriptions; and data flow sheets. Trainers could use this case to illustrate how the lack of some elements of strategic planning can hinder operational activities. NB: There is a complementary case entitled, "Commission on Population: Regional Population Program (A)", by the same author. PLN-Shelf.

CASE/ FP/ HRM/ PLN/ HRM-1/ HRM-4/ PLN-2/ PLN-3/ PLN-4/ PLN-5/
ENG/ Manpower Planning/ Organizational Design/ Strategic
Planning/ Participative Management/ PHI/ INT/.

112. Stern, Rolph. FamiPlan; 8 pp.

The executive director of a family planning program that depends on outside sources for its funds receives a letter notifying him that his funding has been cut.

FIN - funding.

CASE/ FP/ FIN/ PLN/ SPA/ INT/ funding/.

113. Strachan, Deirdre, and David C. Korten. Clinica de Planificacion Familiar Guadalupe (Guadalupe Family Planning Clinic); 15 pp.

A case study about a beleaguered family planning clinic.

HRM - family planning.

CASE/ FP/ HRM/ POL/ SPA/ INT/ family planning/.

114. Strachan, Deidre and David C. Korten. The Guadalupe Family Planning Clinic (Part A). Korten, Francis F., and David C. Korten. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1974; c1977: p7 - p30; 24 pp.

Note: This case is the first of twelve located in the Casebook For Family Planning Management.

In this case, a newly appointed Nurse Educator of a Family Planning Clinic within a Health Center in Latin America, is faced with numerous problems. In an effort to resolve the problems and improve the program's effectiveness, the Nurse Educator intends to develop a workplan with specific steps to address the problems. The reader is asked to identify the factors that are discouraging women from continuing in the program and those hindering the recruitment of new users. After identifying these factors, the reader must determine what actions the Nurse Educator might realistically put in her workplan, given her position and the situation as defined by the case. The case begins with a study guide providing readers with a framework to analyze the case. Also included is a detailed analysis that can be used by trainers in teaching the case, or could be used for self-study. NB: This is the first case of a two part series. The other case is part B, by the same authors.

HRM-Shelf.

CASE/ FP/ PLN/ PLN-4/ PLN-5/ ENG/ SPA/ Workplans/ Problems Identification/Situational Analysis/ Implementation/ Objective Setting/ LAC/ INT/.

115. Strachan, Deirdre and David C. Korten. The Guadalupe Family Planning Clinic (Part B). Korten, F. Francis and David C. Korten. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1974; c1977: p31 - p48; 18 pp.

Note: This case is the second of twelve located in the Casebook For Family Planning.

The second of a two part series, this case focuses on a Nurse Educator in a Family Planning Clinic in Latin America. In the first case, the newly appointed Nurse Educator has decided to design a workplan in an effort to overcome the problems she is facing. In this case, we find the same Nurse Educator one year later. She has developed and implemented a workplan and now has a "model clinic". The reader is also asked to identify and assess the steps the Nurse Educator has taken both in terms of the actions and the process. The reader is also asked to assume the perspective of the Medical Director of the program as he considers how to transfer the successes of this model clinic throughout the program. The case begins with a study guide, providing readers with a framework to analyze the case. NB: The first case is the Guadalupe Family Planning Clinic (Part A).

HRM-Shelf.

CASE/ FP/ PLN/ HRM/ PLN-5/ HRM-9/ ENG/ SPA/ Performance Appraisal/ Staff Development/ Problem Solving/ Supervision/ In-Service Training/ Management Style/ INT/.

116. Strachan, Deirdre and David C. Korten. The Overcrowded Clinic. Korten, Francis F. and David C. Korten. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1974; c1977: p49 - p90; 42 pp.

Note: This case is the third of twelve located in the Casebook For Family Planning Management.

Management issues affecting patient flow and clinic efficiency are the major topics addressed by this case. Set in a Latin American family planning clinic, the clinic is experiencing operating problems due to a variety of factors. These include the absence of defined objectives and target population, and an adherence to procedures that interferes with the clinic's purpose. On a visit to the clinic, the medical supervisor of the clinic is confronted with these problems and must determine how to make effective changes. The supervisor is given the task of altering the procedures and in involving the clinic staff in the change process in a way that will encourage them to solve similar problems on their own in the future. The case includes a study guide that provides readers with a framework to analyze the issues presented in the case. The case analysis includes three simple exercises to introduce the concepts of target population and clinic output. It continues with a detailed section on the possible remedial actions that might improve the clinic. NB: This casebook contains other related cases. "Target-setting in La Trinidad", is a case that contains more technical information on target setting.

HRM-SHelf.

CASE/ FP/ PLN/ PLN-6/ PLN-3/ PLN-4/ PLN-5/ ENG/ SPA/ Clinic Based Delivery Systems/ Clinic Efficiency/ Patient Flow Analysis/ Target Setting/ Objective Setting/ User Perspective/ LAC/ INT/.

117. Talpaert, Roger. Managing a Management Development Institution. Geneva, Switzerland: International Labour Office Geneva; 1982; c1982; 277 pp. (Kubr, Milan. Management Development Series; No. 18).

This book was written for anyone involved in designing, planning, managing, and supervising management development institutions. Part I includes chapters on: strategic planning and management links with the environment; recruiting and developing personnel; organizational development and program planning and control. Part II contains four case studies of management institutes in Geneva, Ireland, India, and Venezuela.

Shelf-HRM.

READ/ CASE/ GNL/ HRM/ HRM-1/ HRM-9/ HRM-10/ ENG/ Staff Development/ Organizational Development/ Supervision/ Personnel Recruitment/ INT/ VEN/ IDI/ IRR/ SWI/ RTI.

118. Tamayo, Dr. Fernando and John Ickis. What Happened in Cartago?; 12 pp.

This case looks at a fictitious Latin American country and traces several aspects of the evolution of their successful family planning program. It briefly presents three different rationales for the success of the program: 1) favorable political climate; 2) provision of quality services; and 3) socio-economic development. The second half of the case details the process of institution-building used in this country to create a "favorable climate of opinion", providing insights into the obstacles faced and how they were dealt with.

POL-Policy development.

Case/ FP/ POL/ PLN/ POL-2/ POL-3/ Eng/ Political environment/ Socioeconomic development/ Political support/ Policy development/ Population development debate/ Strategic planning/ INT.

119. Tanada, Rebecca and Jose deles, Jr. The Family Planning Clinic And The Community: The Tondo Tulugan Center. Manila, Philippines: Asian Institute of Management; 1976; 25 pp.

Note: This case is contained in the AIM Casebook.

This case describes a family planning program in the Philippines where services are delivered by a rotating team of medical students and residents from a nearby university. Background information is given on the program design and organization which indicates that while the program does provide needed services for a poor population and exposes students to a good learning experience, there is still room for improvement in the program. The case contains a brief summary of the patients seen on a particular day which highlights issues of user perspective. Trainers could use this case as the basis for classroom discussion or as an exercise where participants could identify the problems in this program and make recommendations to correct them.

PLN-Shelf.

CASE/ EXER/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Clinic Based Delivery Systems/ User Participation/ Program Planning/ PHI/ INT/.

120. Toben, Mauricio. under the supervision of: David W. Young. San Fernando Hospital. Boston, MA: Harvard School of Public Health; 1984; 6 pp.

This case describes a large psychiatric hospital in Mexico City. The hospital's General Director is required to develop a system to measure costs at the hospital in order to facilitate cost control. With the information provided in the text and in the exhibits, the participant is asked to assess what steps are involved in determining costs and to try and compare the new system with the previous system. The participant is then asked to examine the merits and the utility of the system.

FIN-Cost Analysis.

Case/ HLTH/ FIN/ FIN-1/ Eng/ Cost analysis/ Fiscal techniques/ Program costs/INT/ MEX.

121. Uphoff, Norman. Local Institutional Development: An Analytical Sourcebook with Cases. West Hartford, CT: Kumarian Press; c1986; 421 pp; ISBN 0-9311816-38-6.
PLN-Shelf.

PLN/ ENG/ CASE/.

122. Vriesendorp, Sylvia (FPMT). Cases On Delegation - Those Terrible Numbers. Boston, Mass.: Management Sciences for Health; 1987; 2 pp.

This brief case focuses on issues of delegation faced by the director for family planning and MCH services in a district in an African country. The case includes some questions that can be used for discussion. This case is presented in a way that it can be easily adapted for a role play exercise. NB: There are teaching notes and a lesson plan to accompany this exercise located in the Ogun State LGA Workshop coursebook.

HRM-Delegation.

CASE/ ROLE PLAY/ FP/ HRM/ HRM-1/ HRM-9/ ENG/ Delegation/ AFR/ INT/.

123. Vriesendorp, Sylvia (FPMT). Cases on Delegation - The Busy Schedule. Boston, Mass.: Management Sciences for Health; 1987; 2 pp.

This brief case focuses on the problems of a director of Family Planning and MCH program in Africa. Her schedule is too busy for her to be able to complete all of her duties and she decides to delegate some of the work to a subordinate. The case includes study questions. It is set up in a way that it could be used as a role play. NB: There are study questions and a lesson plan to accompany this case located in the Ogun State LGA Workshop coursebook.

HRM-Delegation.

CASE/ ROLE PLAY/ FP/ HRM/ HRM-1/ HRM-9/ Delegation/ AFR/ INT/.

124. Vriesendorp, Sylvia. A Family Planning Strategy for Pandemonia. Boston, Ma.: Family Planning Management Training Project, Management Sciences for Health; 1988; 9 pp.
Exercise to familiarize students with some of the conceptual and practical issues one needs to face in developing a strategic plan for introducing or strengthening FP programs in a developing country setting. The exercise also helps to strengthen students' skills in working in groups for the purpose of decision making and problem solving. The presentation by each group in front of the class (optional) adds an element of learning how to present. Includes 3 page teaching note and 2 page case, plus 2 overheads.

PLN-Strategic Planning.

CASE/ EXER/ FP/ PLN/ ENG/ Program Planning/ Strategic Planning/ Situational Analysis/ Goal Setting/ Problem Identification/ INT/ AFR/.

125. Vriesendorp, Sylvia (Family Planning Management Training Project). The Visit. Boston, Massachusetts: Management Sciences for Health; 1987; 2 pp.

Problems resulting from poor coordination are the subject of this brief case set in Africa. A senior health sister from the Ministry of Health has recently been transferred to a local government administration clinic. While her major responsibility is the supervision of nine outlying clinics, she is also in charge of service delivery at the main clinic. A number of logistical problems have interfered with her planned supervisory and supply visits to the rural clinics, and she is trying to determine how they might have been averted and what steps to take to prevent them from recurring. Study questions accompany the case.

HRM-Supervision.

CASE/ FP/ HRM/ HRM-9/ PLN-2/ ENG/ Supervision/ Logistics/ Problem solving/Coordination/ AFR/ INT/.

126. Wolff, James, & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). The Claratown Monthly Supervisory Meeting: Setting Targets and Evaluating Performance. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

During a large meeting of family planning supervisors and community distributors, the topic of targets surfaces. The reports submitted by the distributors for the previous month indicate a very high proportion of contacts with only a small number of new acceptors being recorded. The supervisor is concerned about the performance indicated by these numbers. The reader is asked to assess how useful the existing targets are, and to consider what other targets might help to improve the performance of the distributors. The case teaching objectives include: understanding how targets can be used to improve performance; understanding how to use the data on all aspects of client visits as indicators of program performance; understanding how to present information so that it can have a positive impact on program performance; and understanding how the distributors' performance can be compared while allowing for differences among client populations.

CASE/ FP/ PLN/ PLN-3/ ENG/ Target setting/ Performance indicators/ INT/.

127. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Dealing with Data. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

In this case, an Evaluation Officer for the family planning program finds himself responsible for developing an ongoing management information system, as well as coordinating with other agencies interested in population policy and providing support to policy decision making. In addition, the Evaluation Officer has been asked to prepare the MIS component of an urban based community distribution program. Given information on the

current systems, the reader is asked to identify the advantages and disadvantages of the present system and to define the information that should be included in the reporting system and how it should be used. The teaching objectives for this case include: identifying the organizational problems in the evaluation department that have contributed to the current situation; understanding how to analyze an existing information system; and identifying the information essential to managers of the different levels of the urban based CBD program, and to understand how this information can be used to improve program management. N.B. This is one of nine cases by the same authors, that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ MIS/ M&E/ MIS-8/ M&E-1/ M&E-2/ M&E-3/ ENG/ Program evaluation/ Program monitoring systems/ Program effectiveness/ INT/.

128. Wolff, James, & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). The Decision. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

In this case, the Executive Director of the National Family Planning Program is dissatisfied with the impact her organization is having on delivering services to women of reproductive age. After reviewing the statistics, the director has decided to develop a better outreach program and has asked for advice on alternative outreach strategies. The teaching objectives addressed by this case include: understanding how to use demographic and programmatic data in preparing a strategic plan; identifying different strategies for service delivery; and understanding what information is needed to assess the feasibility of each strategy in a particular situation. N.B. This is one of nine cases by the same authors, focusing on various aspects of the family planning program described in this case. CASE/ FP/ PLN/ PLN-1/ PLN-2/ HRM-6/ ENG/ Strategic planning/ User perspective/ Needs assessment/ INT/.

129. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Financial Management Control: No Need For Strong Arm Tactics. Boston, Massachusetts: Management Sciences for Health; 1987; 6 pp.

Note: This case is currently under development.

In this case a new financial manager has been hired to develop a financial management system for an urban based community distribution project of the National Family Planning Program. The case is divided into three sections. In the first section, the new officer outlines his principal objectives for the new system, and prepares a rough draft of the elements in the system. At this stage the reader is asked to design a financial system for the CBD program. In the second section, the system that the financial officer has developed to track each financial transaction in the CBD program is detailed. The reader is asked to compare this with the system created in the first section of

the case and to identify potential problems. In the final section, the financial officer has implemented the system and is trying to solve some of the problems with the system. The case teaching objectives include: understanding how to analyze a financial control system; understanding how to develop reporting procedures for all organizational levels; and realizing the difficulties in implementing a system of strict financial controls. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case. CASE/ FP/ FIN/ FIN-4/ ENG/ Financial planning and management/ Fiscal techniques/ INT/.

130. Wolff, James, & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Getting International Support. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

In this case, the Executive Director of the National Family Planning Program is drafting a proposal directed at securing new funds for an outreach program in the capital city region. The reader is asked to assume her role and to determine what information would be important for a needs assessment of the target communities, and to identify the key steps to be taken before drafting the initial proposal. The teaching objectives for this case include: understanding how to undertake a needs assessment of a community; and understanding the importance of planning and public relations for community development projects. N.B. This is one of nine cases by the same authors that focus on various aspects of the family planning program described in this case.

CASE/ FP/ PLN/ PLN-1/ PLN-2/ PLN-4/ PLN-6/ ENG/ Strategic planning/ Needs assessment/ Community survey/ Situational analysis/ INT/.

131. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Leaving Nothing To Chance. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

In this case, the Executive Director for the National Family Planning Program is formulating a workplan for her activities during the next several months. The information provided gives the reader a clear sense of the director's management style and how effective she has been to date. The training objective for the case is to understand the relationship between management style and program effectiveness. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ HRM/ HRM-1/ ENG/ Management style/ Program effectiveness/ INT/.

132. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Mr. Krumah's Dilemma. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

Data collection is the topic of this case. A supervisor from a community based distribution project is having a monthly meeting with one of the distributors and learns that the distributor has developed his own system for gathering and recording data from his visits. The reader is asked to assess why this has happened and to determine what data is really important to both the distributor and the supervisor. The case teaching objectives include: understanding how the distributor uses information to conduct his business; and how the design of a form affects information use. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ MIS/ MIS-3/ MIS-4/ MIS-6/ ENG/ Program monitoring systems/ Data collection/ Records/ INT/.

133. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). The Royalton Monthly Supervisory Meeting. Boston, Massachusetts: Management Sciences for Health; 1987; 5 pp.

A monthly supervisory meeting for CBD family planning workers is the subject of this case. The meeting is described in some detail with an exchange of dialogue between the supervisor and several of the distributors. During the meeting, the supervisor introduces the concept of self-evaluation to be pursued at the next meeting. The reader is asked to describe the supervisor's style, noting the techniques she uses to encourage participation and to improve performance. The objectives of this case include: understanding the importance of conveying an organization's mission to its employees; identifying and understanding the components of effective supervision; and understanding how a supervisor can use information and specific targets to improve performance. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ HRM/ HRM-1/ HRM-9/ ENG/ Management style/ Supervision/ Management of groups/ Team building/ INT/.

134. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). The Sales Force. Boston, Massachusetts: Management Sciences for Health; 1987; 4 pp.

Note: This case is currently under development.

The use of financial incentives to motivate CBD personnel is the focus of this case. A new commission system has recently replaced the salary system for CBD personnel, and some of the issues resulting from this change are described. The reader is asked to identify the problems with the financial incentive system and with the supervisory system. In addition, the reader is asked to determine what financial data would be useful to

assess the success of the incentive scheme and to make recommendations for the next phase of the scheme. The case teaching objectives include: identifying the major issues surrounding the use of financial incentives to motivate CBD workers; understanding how financial data can be used to monitor program effectiveness and motivate staff; and understanding the relationship between product price, sales, and client acceptance. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ PLN/ PLN- 6/ ENG/ Marketing/ Competitive strategy/
Pricing policies/ Contraceptive sales/ Remuneration systems/
INT/.

135. Wolff, James, Robert A. Cushman, C. Elizabeth McGrory, Florida Kweekah. Beyond The Clinic Walls: Cases Studies in Community-Based Distribution. C. Elizabeth McGrory ed. Boston, Massachusetts: Family Planning Management Training Project; 1989; 92 pp. (Linda Sutzenfield).

Note: This case book is one in a series of four handbooks for managers of family planning programs.

Beyond the Clinic Walls contains a series of case studies which depict the management issues a family planning organization faces in designing and implementing a new community-based distribution program. Divided into four parts, the book includes sections on: planning; management information systems; supervision; and compensation of workers and the pricing of contraceptives. Each section begins with a discussion of the major management issues which the case(s) in that section address, and an introduction to the concepts to be used in analyzing the cases. Each case is followed by an analysis which addresses the major themes presented in the case, and by study questions. These analyses should help to stimulate and guide discussion about the cases and questions. The cases book is intended for use in training programs or self-instruction for managers of community-based distribution of family planning services.

TOT-shelf.

CASE/ FP/ HRM/ MIS/ LOG/ ENG/ CBD Programs/ INT/.

136. Yin, Robert K. Case Study Research - Design and Methods. Beverly Hills, California: Sage Publications; 1984; 160 pp.

"This book is about designing and conducting case studies for research purposes." The book covers the distinctive characteristics of the case study strategy, as compared to other types of research. Information is provided on all phases of design, data collection, analysis and reporting. Throughout, the author briefly reviews forty case studies conducted for research purposes, using them to highlight points made in the text.

TOT-Shelf.

CASE/ READ/ GNL/ TOT/ TOT-2/ ENG/ Case Writing/ BB/ RTI/ INT/.

137. Yinger, Nancy, Richard Osborn, David Salkever, and Ismail Sirageldin (The Johns Hopkins University). Third World Family Planning Programs: Measuring the Costs. Washington, DC: Population Reference Bureau, Inc.; February, 1983. (Population Bulletin; Vol. 38; (No. 1)).

This bulletin explains and demonstrates the use of cost-benefit analysis and cost-effectiveness analysis in evaluating family planning programs in developing countries. The bulletin includes nine case studies set in Brazil, Colombia, Ghana, Haiti, India, Thailand, and Zaire. They are presented to demonstrate what cost-effectiveness analysis has revealed about the following issues: integration of family planning with health services; use of paramedical staff; and community-based distribution as a technique to promote contraceptive use. Figures, tables, and technical boxes throughout the text, can be used in discussion.

FIN-Resource Allocation.

Read/ Case/ FP/ FIN/ FIN-1/ FIN-2/ Eng/ Resource allocation/ Cost benefit analysis/ Cost effectiveness analysis/ Integrated programs/ Auxillary personnel/ Community based distribution programs/ BRA/ COL/ GHA/ HAI/ IDI/ THA/ ZAI.

138. Young, David W. Afrtrain-Cameroon. Boston, MA: Harvard School of Public Health; 1983; 5 pp.

Designed to serve as the basis for a class discussion, this case describes an African Training PVO experiencing cash flow problems due to the lag time in receiving monies from its overseas headquarters. An income statement, balance sheet, and a projection of requirements for trainees and personnel, provide data for discussing the case and give participants an opportunity to practice skills in reading these sheets and utilizing the information they contain.

FIN- Cost analysis.

Case/ HLTH/ FIN/ FIN-1/ Eng/ Accounting/ Cost analysis/ Private non-profit/ Fiscal techniques/ INT/ CAM/.

139. Young, David W. Clinique Nosral. Boston, MA: Harvard School of Public Health; 1984; 6 pp.

This case asks the reader to assess the factors contributing to cost overruns in a rural clinic in Lower Volta. Background information on the country and the health system are provided with a description of how the clinic is staffed and operated. Four exhibits are included to give the reader data on: 1) the organizational structure of the clinic; 2) the expected and actual number of visits and medical supply costs for one year; 3) the estimated and actual visit time requirements; and 4) the clinic budget. The clinic director has been asked to reduce the overruns and to prepare a report describing her activities. This case could be used as the basis for class discussion and/or students could be asked to prepare a written assignment. It provides the reader with an opportunity to use some financial analysis tools as the basis for management decisions.

FIN- Cost analysis.

Case/ HTLH/ FIN/ FIN-1/ FIN-2/ Eng/ Fiscal techniques/ Cost

analysis/ INT.

FPMT LIBRARY - FINANCE

1. Abramson, Susan. Development of Health Sector Financing Project: Indonesia. Arlington, VA: Technologies for Primary Health Care (PRITECH); 1986; 13 pp.
This is a report prepared by a consultant on a trip to Indonesia to lay the groundwork for the development of a health sector financing project. The paper reports on the current mix of public and private financing mechanisms within the health sector, and how the political and economic situation within the country impacts these systems. Recommendations are given for a private sector health project which includes a delineation of the goals and objectives of this project. While specific to Indonesia, this report clearly illustrates the complex inter-relationship of government and private sector, and shows how economic variables, such as the drop in oil revenues, can alter this relationship.
NB: This could be used as a background reading for a training session that focused on health sector financing in other countries with oil based economies, such as Nigeria.
FIN- Health care financing.
Read/ HLTH/ FIN/ FIN-3/ Eng/ Health care financing/ Government support/ Prepayment plans/ Social security financing/ INT/ IND.
2. Alan Guttmacher Institute. International Family Planning Perspectives; 1986-.
Published quarterly by the Alan Guttmacher Institute, this journal contains articles and special reports on international family planning topics.
REF-Shelf.
READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.
3. Anonymous. Budget Monitoring Tool; 1 pp.
Simple monthly budget monitoring tool. This sample form is from a daycare center.
FIN-Financial Monitoring.
TOOL/ GNL/ FIN/ ENG/ Financial Monitoring/ DOM/.
4. Anonymous. Managing Financial Resources and Expenditures. Boston, Massachusetts: Management Sciences for Health; 72 pp.
This three hour session on managing financial resources and expenditures, is a component of a thirteen day management training course. The objectives of the session include: 1. being able to define and describe common financial terms and methods used in the health sector and sources and categories of expenditures; and 2. being able to describe the current and projected future financial situation in the health sector in many developing countries. A detailed description of the health sectors in Rwanda and Togo provide the information to help the participant understand the implications of health expenditures on the health plan for the country. Included with the session are: notes; worksheets; an exercise on affordability analysis; overhead transparencies; and a table on alternative methods of community financing.

FIN-Shelf.

TOOL/ EXER/ Course/ HLTH/ FIN/ FIN-2/ ENG/ Resource allocation/
Cost analysis/ Fiscal techniques/ Program costs/ Capital and
variable costs/ Recurrent and fixed costs/ Direct and indirect
costs/ Unit costs/ RWA/ TOG/ INT/.

5. Anthony, Robert N. and David Young. Management Control in Non-Profit Organizations. Homewood, IL: Irwin; 1984; 680 pp.
This text on financial management and control was written specifically to improve the skills of individuals working in non-profit organizations. Although written to apply to all types of non-profit organizations including governmental entities, the book can easily be adapted for a course that focuses on health care by selecting appropriate cases from the 48 that are included. The text can be used as a whole, or to focus on a specific skill such as: accounting; budgeting; pricing decisions; cost analysis; cost benefit analysis; reporting; or evaluation. The text can be used as background reading for participants, or to provide trainers with lecture materials. Each of the cases comes with a series of questions for the reader to address and can be used to prepare written exercises or as the basis for discussion.

FIN-Shelf.

Book/ case/ GNI/ FIN/ FIN-1/ FIN-2/ FIN-3/ FIN-4/ ENG/
Accounting/ Cost analysis/ Cost benefit analysis/ Pricing
policies/ Budgeting/ Government support/ BB/ INT.

6. Anthony, Robert N. and Regina Herzlinger. Nasus Clinic. Homewood, Illinois: Richard D. Irwin, Inc.; 1980; 2 pp.
Note: from "Management Control in Nonprofit Organizations".
This short case outlines an ambulatory care clinic that recently began to experience losses. Exhibits detailing the monthly standard labor costs, overhead expenses, and the actual labor expenses are provided. The participant is asked to analyze the information to determine the standard and actual profits, deviations from expected profits and to propose a solution to the problems being experienced by the clinic.

FIN- Cost analysis.

Case/ HLTH/ FIN/ FIN-1/ Eng/ Cost analysis/ INT.

7. Anthony, Robert N. Preparacion de Presupuestos (Preparing Budgets). INCAE; 22 pp.

Note: Trans. Olympia Vivas Robelo.

The article presents an overview of the accounting process, especially the development of budgets. Gives various steps for development and administration of the budget.

FIN - budget.

TOOL/ GEN/ FIN/ SPA/ INT/ FIN - budget/.

8. Austin, James A. Primary Health Care in Honduras ed. Boston, MA: Harvard Business School; 23 pp.

In this case, an AID health officer in Honduras is faced with a financial crisis caused by a lack of funds to cover recurrent costs. This crisis is affecting the continuance of an AID multi-million dollar primary health project. His task is to develop a convincing project which addresses the economic, political, and organizational constraints surrounding the program. Using extensive background information, the reader is asked to take on the challenge faced by the health officer, and to evaluate the health options available to both reduce and meet recurrent costs. The analysis is to include: looking at alternative financing mechanisms, including user fees, prepayment schemes, and a rotating drug fund; potential cost containment, efficiency and productivity measures for hospital construction and development; and new roles for both public and private sector institutions. This case could be used to work on each of these areas or to address them individually. NB: Village Health Workers in Honduras is another case on primary health delivery in Honduras that covers: productivity; efficiency; program impact; cost effectiveness; anticipated recurrent costs; and monitoring procedures.

FIN- Health care financing.

Case/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-3/ ENG/ Health Care Financing/ Fiscal Techniques/ Cost Analysis/ Resource Development/ User Financing/ Prepayment Plans/ Recurrent and Fixed Costs/ INT.

9. Bang, Abhay and Rani. Voluntary Health Programmes Should Not Try To Become Economically Self-Sufficient; 5 pp.

This article argues that the goal of economic self-sufficiency in voluntary health programs results in the loss of the primary objective which is to improve health. The concepts of income generation, resource allocation and curative versus preventative care are all raised to support the author's central theme.

FIN- Resource Allocation.

Read/ Hlth/ FIN/ FIN-3/ Eng/ Resource allocation/ Income generation/ INT.

10. Bekele, Abraham; Maureen A. Lewis. Financing Health Care in the Sudan: Some Recent Experiments in the Central Region.

International Journal of Health Planning & Management; Jan-Mar 1986; vol. 1(no. 2): pp111-129.

" This article describes and analyzes a set of experiments designed and implemented by the Sudan's Central Province that have effectively raised the operating budget of the regional health ministry. The seven experiments encompass imposition of fees, cost containment efforts, and local taxes earmarked for health."

FIN-Cost Recovery.

READ/ HLTH/ FIN/ FIN-3/ ENG/ Community Financing/ Prepayment Plans/ SUD/ INT/.

11. Berman, Harris A. On HMOs; 8 pp.

A brief paper on what an HMO is and its promises for developing countries. This could be made into a short hand-out for middle or higher level managers in countries where HMOs exist, or for policy makers unfamiliar with HMOs.

FIN-Health Care Financing.

READ/ HLTH/ FIN/ FIN-3/ ENG/ Health Care Financing/ HMO/ Prepayment Plans/INT/.

12. Bertera, Robert L. and Lawrence W. Green. Cost-Effectiveness Evaluation of a Home Visiting Triage Program for Family Planning in Turkey. Public Health Briefs; September 1979; Volume 69(No. 9): pp. 950- 953.

Report of a study conducted in Turkey to determine the comparative cost-effectiveness of delivering family planning services to 3 groups assigned as having high and low priorities for services. The criteria used in assigning couples to the three groups is defined, as are the evaluation design and the methods. Using tables and graphs, the study illustrates how cost-effectiveness analysis can be used to make decisions about program strategies.

FIN- Resource Allocation.

Read/ FP/ FIN/ FIN-2/ Eng/ Cost effectiveness analysis/ Resource allocation/ Traditional birth attendants/ Community based distribution programs/ INT/ TUR.

13. Brady, Timothy, Jeremiah Norris, Robert Rosenberg, and Michael Wood. Seminar-Workshop on Health Care Financing Schemes. Washington, DC: Pritech; 1985; 12 pp.

This is a report prepared by a group of consultants who traveled to the Philippines to research health care financing mechanisms. They also report on a workshop they conducted to provide technical information on prepayment to public and private sector groups. The findings of the group are summarized, and their recommendations are described. There is a frequent reference to the HMO Act of 1973 in the United States, and how the US experience with regard to this act relates to the fledgling HMO movement in the Philippines.

FIN- Health Care Financing.

Read/ HLTH/ FIN/ FIN-3/ Eng/ Health Care Financing/ Prepayment Plans/ Social Security Financing/ INT/ PHI.

14. Centre for Management Development. Management Case Book. Lagos, Nigeria: Centre for Management Development; 1985; 200 pp. Based on real cases from Nigeria, this book focuses on a range of management issues. It contains 37 cases which have been divided into four content areas: general management; personnel management and industrial relations; marketing management; and accounting and financial management. Each case is accompanied by discussion questions. None of the cases included are based in a health care setting, but some of the issues raised are applicable and can be adapted.

HRM- Shelf.

Case/ GNL/ HRM/ FIN/ HRM-1/ HRM-2/ HRM-3/ HRM-4/ HRM-9/ FIN-4/
Eng/ Management, General/ Supervision/ Organizational
Development/ Financial Planning and Management/ INT/ NIR.

15. Coeytaux, Francine, MPH, and Dayl Donaldson, MA, MPH.
Evaluation of Mobile Family Planning Services in Tunisia. Boston,
MA: Pathfinder Fund; September 30, 1986; 8 pp.

This concise paper reports on an evaluation of mobile family
services in Tunisia. Background information is given on the
country and this service delivery system. This is followed by an
analysis of this system in terms of the couple-years of
protection derived from the mobile units and the cost-
effectiveness of this form of service delivery. Trainers could
use this to illustrate mobile service delivery and to discuss
issues of resource allocation.

PLN-Mobile Units.

READ/ FP/ PLN/ FIN/ PLN-6/ Resource Allocation/ Mobile Units/
Cost Effectiveness Analysis/ Service Delivery Systems/ TUN/ INT/.

16. Crandon, Libbet Dr. Women, Enterprise and Development:
Pathfinder Fund; September 1980 - December 1984; 167 pp.

This is a comprehensive report on five projects undertaken by the
Pathfinder Fund to support Woman in Development. The projects
were designed as group-owned productive enterprises, operating in
the formal economic sector. The report includes information on
project development, implementation and an evaluation of each
project. The projects were located in Brazil, Costa Rica,
Honduras and Jamaica.

PLN-Shelf.

READ/ GNL/ FIN/ PLN/ FIN-2/ FIN-3/ PLN-1/ PLN-2/ PLN-5/ ENG/
Project Development/ Implementation/ Women's Programs/ Resource
Development/ Income Generation/ Program Planning/ BRA/ COS/ HON/
JAC/ INT/.

17. Creese, A. L. and R. H. Henderson. Cost-benefit Analysis and
Immunization Programmes in Developing Countries. Bulletin of
World Health Organization; 1980; Vol. 58: pp 491- 497.

The cost-benefit approach to health sector planning in developing
countries is reviewed briefly, followed by an outline of the
specific categories of costs and benefits in immunization
programs. Results are presented from a number of economic
studies of immunizations programs and possible improvements to
the cost-benefit approach are included. A brief summary of the
article in French concludes the article.

FIN- Resource allocation.

Read/ HLTH/ FIN/ FIN-2/ ENG/ FRE/ Fiscal Techniques/ Cost benefit
analysis/ INT.

18. Davies, John and Terrence D. J. Louis. Measuring the Effectiveness of Contraceptive Marketing Programs: Preethi in Sri Lanka: Population Services International; 8 pp.

Describes and analyzes a contraceptive marketing program implemented in Sri Lanka. Social marketing techniques used in the program are evaluated and proposals are included to refine them. Cost effectiveness of the program is measured by calculating the cost of births averted by the program. A discussion of the calculations is provided in the footnotes.

FIN- Resource allocations.

Read/ FP/ FIN/ FIN-2/ Eng/ Cost effectiveness analysis/ Social marketing/ INT/ SRL.

19. de Ferranti, David M. Costs and Priorities in a Developing Country. Washington, DC: The World Bank; 1984; 31 pp. excerpts from: selected reports and working papers of the World Bank. This is a composite of materials examining costs and priorities for health care in developing countries. It includes tables, diagrams and charts excerpted from selected reports and working papers of the World Bank, in addition to prepared questions designed to stimulate class discussion. The questions address the following topics: Mobilizing additional resources by increasing cost recovery in the social sector; need to increase efficiency of resource utilization; and the need to improve equity by correcting distributional imbalances. There are specific questions on: user charges; other payment methods; resource allocation; key issues on main-line government hospitals; and public vs. private sector roles in the health sector. They could be used as a tool to supplement other course materials on these topics. The tables, diagrams and charts could be used to develop exercises, flip charts, overheads and hand-out material.

FIN- Resource allocation.

Tool/ Exer/ Hlth/ FIN/ FIN-2/ FIN-3/ ENG/ Health Care Financing/ Resource Allocation/ User Fees/ Public Sector Programs/ Private Sector Programs/ Social Security Financing/ Community Financing/ Prepayment Plans/ Income Generation/ INT.

20. de Ferranti, David M. Paying for Health Services in Developing Countries. Washington, DC: The World Bank; 1985; 111 pp. (World Bank Staff Working Papers; (no. 721)).

This paper presents an overview of the principle issues, problems, and policy options in financing health services in developing countries. The weaknesses in existing policies, which finance health care to a significant extent through public revenue sources, are reviewed. Alternative approaches are identified and examined with emphasis on: increasing opportunities for cost-recovery from users; the potential role of financial risk-sharing arrangements, ranging from large and formal insurance plans to small community-based cooperatives; the public/private mix in both providing and financing care; and the structuring of subsidies and their incentive effects.

FIN-Shelf.

Read/ Hlth/ FIN-3/ Eng/ FIN/ User financing/ Contraceptive sales/Fee for services/ Pricing policies/ Community financing/ Cost recovery/ Prepayment plans/ Income generation/ Government support/ INT.

21. Dearden, John. Cost Accounting Comes To Service Industries. Harvard Business Review; September-October 1978; 56(5): 132-140. Note: 2 copies.

This is a technical article that discusses an alternative cost accounting system that might be adopted by service companies. The article contains sections on the following topics: Uses of product cost data; cost systems; and cost analysis in the public sector.

FIN-Accounting.

READ/ GNL/ FIN/ FIN-1/ ENG/ Accounting/ INT.

22. (CEDPA). Developing Plans and Budgets; 56 pp.

This was developed as a thirteen and a half hour comprehensive workshop to provide participants with an overview of the planning and budgeting processes. Specific units cover: management by objectives and results; workplans; steps in budget development; and, monitoring and controlling the implementation of plans and budgets. Included are: facilitator objectives; participant objectives; requirements; session handouts; training aids; notes on advance preparation; and suggested advance readings. This participation workshop was designed for use in Nepal, but is readily adaptable for use in other countries. The handouts could be useful for trainers preparing to teach any of the topics that are covered by this workshop.

PLN-Work Plan.

COURSE/ TOOL/ EXER/ GNL/ FIN/ PLN/ PLN-5/ FIN-1/ Budgeting/ Fiscal Techniques/ Program Planning/ Implementation/ Objective Setting/ Workplans/ MBOR/ NEL/ INT/.

23. Dufour, Patrice. Le Management des Ressources Financieres. Katuala, Jacques ed. Pittsburgh, PA: University of Pittsburgh; 1983; 358 pp. (Seminaire Francophone en Management du Developpement; Module IV).

One of four modules designed to improve the skills of managers in the development field, especially in Francophone Africa. This is a ten-day course on the management of financial resources. The module contains: an outline of the themes; learning objectives; key concepts presented; a narrative presentation of the concepts in the context of the overall relationship between management and development; and related readings, case studies and exercises. The text is divided into five segments: the elements of accounting; actualisation techniques; financial and economic analysis; the budget and public finance; and the budgets of public management.

FIN- Shelf.

Course/ Case/ Exer/ Read/ GNL/ FIN/ FIN-1/ FRE/ Fiscal techniques/ Accounting/ Budgeting/ INT/ FAF/ AFR/ CRB/.

24. Dufour, Patrice and Jacques Katuala. Planification et Management des Projets. Jacques Katuala and David Gould ed. Pittsburgh, Pennsylvania: University of Pittsburgh; 1983; 242 pp. (Séminaire Francophone en Management du Développement; Module III).

This is the third module of a group of four designed to improve the skills of managers of development projects in Francophone Africa. Divided into six segments, this module focuses on project planning and management. The segments address the following: project planning and development; the project cycle; project preparation; the search and negotiation of financing; implementation; and evaluation. Each segment contains learning objectives, and a combination of simulations, cases, and exercises.

PLN-Shelf.

COURSE/ EXER/ CASE/ GNL/ FIN/ PLN/ PLN-3/ PLN-4/ PLN-5/ FRE/
Project development/ Implementation/ Program planning/ Program
evaluation/ Health care financing/ FFA/ CRB/ AFR/ INT/.

25. Elkins, Henry Ph.D., and Luis Fernando Macias (Center for Population and Family Health). Component Cost-Effectiveness in the Mexican New Strategies Project. NY, NY; March 1983; 16 pp.

This paper reports on an analysis of some of the costs incurred in a CBD family planning project in Mexico. It looks at two types of direct costs: the non-recurring cost of initial recruiting, and training and the recurring costs of supervision. The authors perform a cost-effectiveness analysis enabling them to make programmatic decisions. Trainers could use this to illustrate how cost-effectiveness analysis can be performed and how the technique can be applied in program planning.

FIN-Resource Allocation.

READ/ FP/ FIN/ FIN-2/ ENG/ Cost Effectiveness Analysis/ Resource
Allocation/ MEX/ INT/.

26. Family Planning International Assistance. Financial Accounting System. New York: Family Planning International Assistance; November 1981; 26 pp.

Note: 4 copies- English. 1 copy- French.

While this manual was written to ensure that grantees of FPIA have an accounting system in accordance with contract requirements, it provides the information necessary to develop a simple financial accounting system. It describes: system controls and procedures; setting up of a journal or ledger; how to enter information into the journal; and how to utilize data to prepare financial reports.

FIN- Accounting.

Man/ GNL/ FIN/ FIN-1/ FIN-4/ ENG/ FRE/ Fiscal techniques/
Accounting/ INT.

27. Family Planning International Assistance. Working Toward Self-Sufficiency. New York: Family Planning International Assistance; January 1986; 58 pp.

Note: 4 copies.

This manual was designed by FPIA to document their experience in projects working toward self-sufficiency, to present some ideas for generating income, and to describe how to account for the income once it has been generated. Sections cover: planning to achieve self-sufficiency; keeping project costs minimal; improving agency performance; selling contraceptives; family planning experiences; selling training and/or technical assistance services; selling IEC material; raising funds through non-family planning related ventures; generating income; and accounting for income that is generated. To aid in the planning process, questions and assessment criteria accompany each of these sections. Well-documented examples of projects from around the world are presented to illustrate the various strategies available for achieving self-sufficiency.

FIN- Revenue Generation.

Man/ FP/ FIN/ FIN-1/ FIN-3/ Eng/ Family planning/ Income generation/ Fundraising/ Contraceptive sales/ Commercial operations/ Contracting services/ Accounting/ BB/ INT.

28. (Alan Guttmacher Institute). Family Planning Perspectives; 1986-.

Published bimonthly by the Alan Guttmacher Institute, this journal contains articles and special reports on domestic family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

29. Financial Manual for Grantees. Chestnut Hill, MA: The Pathfinder Fund; July 1986; 45 pp.

Written for grantees of the Pathfinder Fund, this manual provides an elementary understanding of the steps involved in the accounting process and gives the tools and instructions necessary to set up and maintain a simple, single-entry accounting system. Minimum control procedures are covered, as well as a detailed description of the accounting process. Ten typical accounting transactions are presented with an outline for how the respective accounting entries should be made. The manual concludes with an outline of the forms and procedures necessary to control equipment supplies and commodities of an organization.

FIN-Accounting.

Man/ FP/ FIN/ FIN-1/ FIN-4/ Eng/ Fiscal techniques/ Accounting/ INT.

30. Finkle, Jason L., Gayl D. Ness, and Ruth Simmons. Management in Family Planning Programs Literature, Concepts and Research Agenda. Center for Population Planning, University of Michigan: Ann Arbor; 8 June 1984; 45 pp.

Note: 2 copies.

This is a comprehensive overview of family planning program management. The authors identify three arenas for family planning management as: program management; resource mobilization; and the population served by the program. The functions of management are then described as: planning; organizing; staffing; directing; and controlling. There is a discussion of each topic listed above which includes a review of the pertinent literature. An agenda for further research in the field concludes the article. The material is written in such a way that it forms a matrix for the various components of management. In addition to HRM, this could be used as a general introduction to many aspects of family planning program management, including policy, financial management, and logistics. NB: This report is also included in a Final Report on Managing Delivery Systems - Identifying Leverage Points for Improving Family Planning Program Performance. This report is also indexed under the author's name, Jason L. Finkle.

HRM- Management, General.

Read/ FP/ HRM/ FIN/ POL/ HRM-1/ HRM-9/ Eng/ Management, General/ Management Style/ Self-Management/ Supervision/ Policy Environment/ Resource Development/ INT/.

31. Godisman, Leonard. Centro de Salud Comunitario de San Ramon (San Ramon's Community Health Center). INCAE; a981; 7 pp.

A mostly numeric case study and exercise on a health center and its budget.

FIN - budgeting.

CASE/ GEN/ FIN/ SPA/ INT/.

32. Goldman, William R. Financial Viability for the Health Sector; 6 pp.

Some thoughts on financial viability of AID Health Projects, with special mention of some Asian projects (from The Asia Bureau).

FIN- Health Care Financing.

READ/ HLTH/ FIN/ FIN-3/ ENG/ Health Care Financing/ SEN/ PPI/ THA/ BAN/ NEP/ PAK/ INT/.

33. Gordon, Andrew J. and Donald S. Shepard. Village Health Workers in Honduras: A Teaching Case. Boston, MA: Harvard School of Public Health; January, 1983; 57 pp.

Note: 2 copies.

Detailed case that assesses a primary health care program in Honduras. The information and data in the case give the reader an opportunity to review productivity, efficiency, program impact, cost-effectiveness, anticipated recurrent costs and monitoring procedures. As a teaching instrument, the case can be used for a single application such as cost-effectiveness analysis of various program expansion options, or can be used more broadly

to assess the entire program. The group could be divided in order to address the various areas of concern. Findings can be given in either a written or an oral form to provide managers with an opportunity to practice presenting and defending proposals. NB: Includes draft notes prepared by a student in response to the case and the assumptions used in calculating a cost-effectiveness analysis. NB: Primary Health Care in Honduras is another case that covers a crisis caused by a lack of funds to pay for recurrent costs for an AID primary health program. The analysis requires looking at alternative financing mechanisms, cost containment, efficiency and productivity measures for hospital construction and development, and new roles for both public and private sector institutions. NB: There is a similar case, The Danfa Project, which focusses on family planning exclusively.

FIN-Resource allocation.

Case/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-3/ Eng/ Cost effectiveness analysis/ Recurrent and fixed costs/ Community Health Workers/ INT/ HON.

34. Halvas, Jorge, and Aurora Rabago, Dorothy L. Nortman, and Jorge Martinez Manautou (Regional Office for Latin America and the Caribbean). Analisis De Costo-Beneficio Del Programa De Planificacion Familiar Del Instituto Mexicano Del Seguro Social. Mexico City, Mexico: The Population Council; 1986; 16 pp. (19). This is a working paper from the Regional Office of The Population Council. It includes a cost benefit analysis of the Mexican Social Security Institute's family planning services during the period from 1972-1985.

FIN-Resource Allocation.

READ/ FP/ FIN/ FIN-2/ SPA/ Cost benefit analysis/ Social security financing/ MEX/ INT.

35. Hassouna, Mary Taylor (Family Planning Management Training Project). FPMT:Final Report of the Workshop on Financial Planning for the Ministry of Health, Imo State, Nigeria. Boston, MA: Management Sciences for Health; January 1987; 56 pp. Reports on two training courses on financial planning conducted in Nigeria by the Family Planning Management Training Project. Includes the course objectives, and the evaluation techniques used to determine if the objectives were met. The appendices contain the proceedings from each of the workshops held, a list of the materials used, and comments from workshop participants, both on their particular concerns and financial constraints, and their observations collected at intervals during their training. These might be useful for trainers in preparing course materials. NB: There is a course entitled: Accounting and Financial Management for Health Programs.

FIN-Shelf.

READ/ FP/ FIN/ FIN-4/ ENG/ Financial planning and management/ INT/ NIR.

36. Herzlinger, Regina. Por Que Fracasan los Sistemas de Informacion en Organizaciones sin Fines de Lucro (Why Information Systems Fall Apart in Organizations with Unlimited Funds). Ecuador: FPMT Project. 1988; 17 pp

Why money tends to be spent poorly in organizations with too much of it, due to poor utilization of available information.

FIN, MIS.

TOOL/ GEN/ FIN/ MIS/ SPA/.

37. How to... Find and Ask for Funding; 1 pg.

Briefly outlines the information necessary when preparing a letter to request funding for a project. Includes a sample letter covering the essential information. Could be used to develop an exercise on soliciting funding.

FIN-Fundraising.

Tool/ GNL/ FIN/ FIN-3/ Eng/ Fundraising/ INT.

38. Huber, Sallie Craig. Creative Financing of Family Planning Projects: Can Programs Pay for Themselves? Washington, DC: Population Crisis Committee; 1984; 12 pp.

This paper addresses some of the issues posed by the intensifying crisis in funding experienced by family planning projects. The author explores some of the creative financing techniques which have been, or might be, used to overcome this shortage of funds. Included are: sale of services; loans; commodities sales; contributions; and direct grants. Actual projects are presented to illustrate some of the strategies and techniques that have been utilized successfully in the developing countries. The author concludes with a discussion of the obstacles or barriers to creative financing, with a particular emphasis on developing countries.

FIN- Health Care Financing.

Read/ FP/ FIN/ FIN-3/ Eng/ Health care financing/ User financing/ Donations/ Commercial operations/ Community financing/ Loans and grants/ Contraceptive sales/ INT.

39. Hutchings, Jane and Lyle Saunders. Assessing the Characteristics and Cost-effectiveness of Contraceptive Methods. Seattle, Washington: PIACT; August 1985; 66 pp.

This paper presents a practical approach to assessing and comparing the cost-effectiveness of various contraceptive methods and delivery systems. Topics covered are: method attributes; delivery systems; use-effectiveness; and costs involved. The reader is then taken through a series of steps to estimate cost-effectiveness. Sample forms are provided to facilitate the calculations and could be used to create an exercise if used with data on contraceptive use in a specific country. NB: The sample forms contained in this booklet can be used to teach participants how to compute cost-effectiveness analysis. Data on contraceptive use and delivery will need to be provided.

FIN- Shelf.

MAN/ FP/ FIN/ FIN-2/ ENG/ Resource Allocation/ Cost Benefit Analysis/ Program Effectiveness/ CBD Programs/ Social Marketing/

Cost Effectiveness Analysis/ INT/.

40. International Contraceptive Social Marketing Project (ICSMP).
~~D~~etermining Pricing Policies in Contraceptive Social Marketing.
Washington, DC: The Futures Group; 102 pp.

This document begins by describing the process by which prices for contraceptives can be set. The detailed steps are: 1) to evaluating the price sensitivity of relevant publics; 2) determining pricing objectives; 3) evaluating the price sensitivity of target markets; 4) selecting a pricing strategy; 5) choosing pricing tactics; and 6) implementing pricing policy. Following this is a section that reviews contraceptive social marketing projects undertaken in different countries. The data from these projects is presented and analyzed, and sample surveys are provided to illustrate aspects of data collection.

FIN- Pricing/ Cost Recovery.

Man/ FP/ FIN/ FIN-3/ Eng/ Pricing policies/ Contraceptive sales/
IEC programs/ Social marketing/ INT/ JAC/ MEX/ COL/ ELS/ EGY/
GHA/ BAN/ NEL/SRL/ IDI.

41. International Planned Parenthood Federation (IPPF). A Review of Self Reliance. London: International Planned Parenthood Federation; 1986; 82 pp.

In an effort to increase total available income, IPPF has encouraged Family Planning Associations to become increasingly self reliant by increasing sources of local and international income. The IPPF report includes analyses and conclusions drawn from the 1985 audited accounts of IPPF grantees. In addition to providing a clear picture of sources of income, including an analysis of local and international income, the review is able to isolate those FPA's which have achieved the best results from particular sources, and those which appear to be missing good potential opportunities. Local sources discussed are: contraceptive sales; patient fees; local governments; fundraising; membership fees; interest fees. Other international income sources are: USAID Bilateral, USAID Cooperating Agencies; Private Donors; United Nations Agencies; Other Governments; Other Private Donors; and other unspecified donors. The report includes a discussion of each of these sources, illustrated by the experience of FPA's from around the world.

FIN- Health Care Financing.

Read/ FP/ FIN/ FIN-3/ Eng/ Health care financing/ User financing/
Contraceptive sales/ Fee for services/ Government support/
Fundraising/ INT.

42. Jacques, Jocelyn and Michel Paquin. Le Budget de Programmes: Un Outil Moderne De Gestion. Montreal, Canada: Editions Agence d'Arc inc.; 1977; c1977; 310 pp; ISBN 0-88586-001-2.

This text discusses all aspects of program budgeting as a management tool. Containing seventeen chapters, the book covers the following topics: systematic program budgeting; objective setting; program structure; the budgeting process; expense categories; program analysis; cost analysis; and cost effectiveness analysis. Designed to be used as a self-study text or a reference, the book opens with a pretest and ends with a post test. The authors have written each chapter to function as a self contained unit allowing the reader to refer back to selected sections.

FIN-Shelf.

READ/ EXER/ GNL/ FIN/ PLN/ FIN-2/ FRE/ Target Setting/ Objective Setting/ Program Planning/ Fiscal Techniques/ Budgeting/ Cost Analysis/ COST Effectiveness Analysis/ BB/ INT/.

43. Kalaule, Ezekiel B., Jane Kwawu, Hammouda Bellamine (Centre for African Family Studies (CAFS)). Report on the First Anglophone Course in Management of Family Planning Programmes. 1 ed.: Centre for African Family Studies (CAFS); May 28, 1986; 91 pp.

These two volumes report on a course in Family Planning program management given at the Centre for African Studies. The course was designed to improve the efficiency and effectiveness of family planning program managers in planning, implementing and evaluating programs. The first volume is a detailed report on the planning of the course. The second volume reports on the specifics of the course. The contents include: the course goals and objectives; course content; a time table; training and learning techniques; the organization of the course; a case study integral to the course; an evaluation; and an analysis and a summary of recommendations. The content of the course has units on the following; an analysis of the environment in which family planning programs are planned and operated in Africa; different approaches to service delivery; the management process; program planning; program implementation; personnel issues; management of equipment, supplies; aspects of financial management; program evaluation; field work; and project writing.

HRM-Shelf.

COURSE/ FP/ HRM/ HRM-1/ PLN/ LOG/ FIN/ FIN-1/ LOG-1/ POL-3/ ENG/ Policy environment/ Family planning programs/ Program cycle/ Program planning/ Fiscal techniques/ Management functions/ Logistics cycle/ INT/ AFR/.

44. Kaufman, Joan, Consultant (The Pathfinder Fund). Financial Manual. Chestnut Hill, MA: The Pathfinder Fund; November, 1985; 27 pp.

Work is still in progress on this manual, but it can be used to determine options for financing family planning programs. In addition to a comprehensive look at the financing alternatives, the manual includes guidelines for selecting and operating the most appropriate mix of financing mechanisms aimed at achieving the greatest degree of self sufficiency in a particular setting. A discussion of how to set up specific mechanisms is provided with examples from programs around the world. Also included are guidelines for assessing the feasibility of a particular scheme within the context of the individual setting.

FIN- Health care financing.
Man/ FP/ FIN/ FIN-3/ Eng/ Health care financing/ User financing/ CBD programs/ Contraceptive sales/ Commercial operations/ Donations/ In-kind donations/ Fundraising/ Loans and grants/ Community financing/ INT.

45. Lennon, Victor A. What Is the Best Selling Price? Chicago: U.S. Small Business Administration; 5 pp. (Management Aids; (Number 1.002)).

While not specific to health and family planning applications, this article provides cost analysis formulas for setting selling prices. Concepts covered are: direct costing; price-volume relationships; establishing a contribution percentage; and determining the selling price.

FIN- Pricing/ Cost recovery.
Read/ GNL/ FIN/ FIN-3/ Eng/ Cost analysis/ Price setting policies/ DOM.

46. Lewis, Maureen A. Pricing and Cost Recovery Experience in Family Planning Programs. Washington, DC: The World Bank; 1984; World Bank Staff Working Papers 684; 75 pp. (Population and Development Series; (Number 9)).

This paper describes cost recovery experience in the family planning programs of Lesser Developed Countries' (LDC's). The author examines some of the issues determining consumer willingness to pay, particularly the full consumer cost of obtaining family planning services, and the sensitivity of consumer demand to changes and differences in contraceptive prices. Divided into four sections, the paper addresses: 1) the prices consumers face for contraceptives and the cost recovery experience in family planning programs; 2) private access costs of contraception; 3) the impact of price levels on demands; and 4) issues in designing cost recovery programs in family planning. Tables are included that compare data from numerous studies addressing the different variables affecting contraceptive utilization.

FIN- Pricing/ Cost Recovery.
Man/ Read/ FP/ FIN/ FIN-3/ Eng/ Pricing policies/ Contraceptive sales/ Fee for services/ INT.

47. Mach, E.P. and B. Abel-Smith. Planning the Finances of the Health Sector: A Manual for Developing Countries. Geneva: World Health Organization; 1983; 124 pp.

This manual was designed to help policymakers and managers of health programs in achieving a more equitable and efficient organization of resources. It delineates a methodology for conducting an analysis of the financing of health services and suggests ways to collect and organize data on expenditure and sources of finance. The eight chapters detail the process and include a number of tables, sample forms, and checklists. The appendix includes examples and analyses of completed tables of health care expenditures which might be used in the policymaking process.

FIN-Shelf.

Manual/ Hlth/ FIN/ FIN-1/ FIN-2/ FIN-3/ Eng/ FIN/ Resource allocation/ Recurrent and fixed costs/ Health care financing/ Capital and variable costs/ Public health policy/ Prepayment plans/ Social security financing/INT.

48. Management Sciences for Health. Cost Determination of Family Planning Services. Boston, MA: Management Sciences for Health; 7 pp.

This paper reviews a cost analysis system designed to assess costs of clinically-based family planning service delivery in proportion to the amount of personnel resources expended. This system was developed in response to changes made in funding and reimbursement of United States family planning programs, but can be adapted to show differences between the costs of different level personnel and the varying times spent on direct and indirect services. Includes an example of this cost analysis technique.

FIN- Cost analysis.

Read/ FP/ FIN/ FIN-1/ Eng/ Fiscal techniques/ Cost analysis/ INT.

49. Management Sciences for Health. Cost Effectiveness Inventory Management Game. Boston, MA: Management Sciences for Health; August, 1984; 3 pp.

This exercise focuses on cost-effectiveness issues raised by inventory management. It is in the form of a game that requires participants to project inventory demands and calculate the costs resulting from their projections. Trainers notes are included.

FIN-Resource allocation.

Exer/ GNL/FIN/ FIN-2/ ENG/ Cost effectiveness analysis/ Inventory management/ INT.

50. Management Sciences for Health. Course on Accounting and Financial Management for Health Programs. Boston, MA: Management Sciences for Health; 303 pp.

This is a fifteen-day course designed for accounting and finance personnel in Yemen. The overall objectives of the course are: to develop a better understanding of the terms and concepts and applications of accounting and finance; to increase awareness of the importance of finance and management in the development of the health system and in health systems delivery; and to be able to demonstrate an ability to work with and analyze accounting, financial and health information. The course is presented day-by-day with participant guides, session notes, exercises, and handouts.

FIN-Accounting.

Course/ HTLH/ FIN/ FIN-1/ FIN-2/ FIN-4/ Eng/ Fiscal techniques/ Accounting/ YEM/ INT.

51. Management Sciences for Health. Financial Management. Boston, MA: Management Sciences for Health; 29 October- 16 November 1983; 100 pp.

This 5-day course is designed to provide participants with basic skills in financial management. Using a combination of lectures and exercises, the topics covered by the course are: budget negotiation; financial projection and budgeting; developmental expenditures and operating costs; cost effectiveness; revenue generating programs; fee for services; revolving drug funds; and use of accounting information for evaluation and future planning. A trainer's guide, trainer's notes, session notes and exercises are all included.

Shelf.

Course/ Hlth/ FIN/ TOT/ FIN-1/ FIN-2/ FIN-3/ ENG/ Budgeting/ User financing/ Capital and variable costs/ Recurrent and fixed costs/ Cost effectiveness analysis/ Fee for services/ Drug procurement financing/ INT.

52. Management Sciences for Health. Financing Health Care in St. Jerome Islands. Boston, MA: Management Sciences for Health; 1984; 14 pp.

Carefully constructed four-part case that examines the various ways to generate funds for health services on the islands of St. Jerome. It is designed to allow participants to develop an understanding of the range of methods available to generate funds and to learn to utilize criteria to evaluate these methods.

Included in the case are a trainer's guide and a session guide, and a series of questions for written and/or verbal response.

FIN- Revenue Generation.

Case/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-3/ Eng/ Mobile units/ Fee for services/ Health care financing/ Recurrent and fixed costs/ Capital and variable costs/ Income generation/ Drug procurement financing/ INT/ CRB.

53. Methodologic Guides for Use Within the Framework for Investment Decision-Making in Health Projects; 15 pp. Describes a systematic approach to assess new or expanded health services. A "measurement loop" is outlined that includes eight steps: 1) assessment of a population's health status and needs; 2) identifying the causes of health problems; 3) identifying and measuring the effectiveness of alternative interventions; 4) determining the coverage required; 5) estimating the impact of the intervention; 6) determining the relationships between costs and effects of interventions; 7) integrating the feasibility, the impact and the efficiency; and 8) implementing the recommendations.

FIN-Resource allocations.

Read/ HLTH/ FIN/ FIN-2/ Eng/ Cost benefit analysis/ Cost effectiveness analysis/ Data collection/ INT/.

54. NCIH. Alternative Health Delivery Systems: Can They Serve The Public Interest In Third World Settings? Washington, D.C.; August 1984; 145 pp.

This is a collection of papers presented at a workshop "convened to examine the experience of alternative health care delivery systems around the world which employ cooperative concepts. Divided into three parts, the first chapter looks at what is known about cooperative concepts and how they might be applied. "In Chapter II, HMOs and their potential applicability to third world settings are examined...In the final chapter, two noted economists discuss recurring patterns and issues of health care financing in the developing countries." Incorporated into the text are discussions about program planning options and operations research.

PLN-SHelf.

READ/ FP/ PLN/ FIN/ PLN-6/ FIN-3/ ENG/ Operations Research/ Service Delivery Systems/ Community Training/ Health Care Financing/ INT/.

55. Nickerson, Clarence B. Control Presupuestario (Budget Control). INCAE - restricted distribution: McGraw-Hill Co, NY; 1962; 17 pp. (Managerial Cost Accounting and Analysis Text). The article deals with various means of developing a budget (fixed and variable) through the means of a case study about a children's summer camp.

FIN - budget.

CASE/ GEN/ FIN - budget/ FIN/ SPA/ INT/.

56. Overseas Education Fund. Organizational Techniques. Washington, D.C.: Overseas Education Fund of the League of Women Voters; 58 pp.

This comprehensive, clearly written manual, details the processes involved in setting up an organization and in helping to ensure success. Using simple language and terminology, the 10 chapters cover the following: 1) Goals, Objectives, and Benefits of Organizing; 2) Structure of Organizations and Board; 3) Membership and Development of Members; 4) The Board; 5) Planning; 6) Budget; 7) Reports; 8) Communication; 9) Money and Other Resources; 10) Building Up an Organization and Analyzing Problems. This manual was written for use in Indonesia but it is readily adaptable for trainers in developing country situations world wide. Examples and illustrations supplement the text and can be used to make overhead transparencies. The manual also contains three useful appendices: a) a section on obstacles to good communication; b) a glossary of terms; and c) an example that illustrates the planning of a community literacy project. PLN-Shelf.

MAN/ GNL/ PLN/ FIN/ HRM/ Organizational design/ Goal setting/ Situational analysis/ Needs assessment/ Budgeting/ INT.

57. Papke, Tonia (FPMT). Budget Monitoring; 4 pp.

Prepared as a report on a consultancy to the Family Planning Association of Kenya, this paper details a budget monitoring system, outlining the responsibilities of key individuals. Forms to be used for a periodic financial report are attached to the report.

FIN-Financial Control Systems.

TOOL/ FP/ FIN/ FIN-2/ FIN-3/ ENG/ Financial Control Systems/ Budgeting/ Ken/ INT/.

58. Papke, Tonia. Budgeting for Fixed and Variable Costs. New York: Management Development International; 9 pp.

This exercise is designed to provide mid-level family planning managers with the budgeting skills that they need to prepare an annual budget, separating fixed and variable costs. The exercise asks the manager of a clinically-based family planning program to budget for a new sterilization program. Objectives and a workplan are provided, and the reader is asked to prepare a first year budget, and to calculate the cost per sterilization procedure. NB: There are two other exercises prepared by this author, entitled, "Introduction to Budgeting" and "Cost per Service Reporting".

FIN- Budgeting.

Exer/ FP/ FIN/ FIN-1/ FIN-2/ FIN-4/ Eng/ Fiscal techniques/ Budgeting/ Program costs/ Capital and variable costs/ Direct or indirect costs/ Recurrent or fixed costs/ Unit costs/ INT.

59. Papke, Tonia (FPMT). Cash Flow Projection; 8 pp.
Developed for the Family Planning Association of Kenya, this paper describes a systematic approach to the preparation of cash flow projections. Worksheets are attached.
FIN-Financial Control Systems.
TOOL/ FP/ FIN/ FIN-1/ FIN-3/ ENG/ Financial Control Systems/
Budgeting/ KEN/ INT/.
60. Papke, Tonia (FPMT). Computerization of FPAK Accounting Systems; 4 pp.
These recommendations were prepared as a component of a consultancy to the Family Planning Association of Kenya. The brief contains information on hardware and software and recommendations for changes in the accounting system.
FIN-Financial Control Systems.
TOOL/ FI/ FIN/ FIN-3/ ENG/ Financial Control Systems/ KEN/ INT/.
61. Papke, Tonia (FPMT). Control of Advances; 3 pp.
As a component of a consultation conducted for the Family Planning Association of Kenya, this was developed to help in controlling travel advances. Included is a narrative description of the required procedures, followed by the appropriate forms.
FIN-Financial Control Systems.
TOOL/ FP/ FIN/ FIN-1/ FIN-3/ ENG/ Financial Control Systems/
Program Costs/ KEN/ INT/.
62. Papke, Tonia (FPMT). Control of Vehicles; 2 pp.
In addition to a sample vehicle log form, there is a page describing a vehicle control system devised as a financial control mechanism for the Family Planning Association of Kenya.
FIN- Financial Control Systems.
TOOL/ FP/ FIN/ FIN-1/ FIN-3/ ENG/ Financial Control Systems/
Program Costs/ KEN/ INT/.
63. Papke, Tonia (FPMT). Control of Area Office Imprest; 2 pp.
This paper discusses an imprest system recommended by a consultant to the Family Planning Association of Kenya.
FIN-Financial Control Systems.
TOOL/ FP/ FIN/ FIN-1/ FIN-2/ FIN-3/ ENG/ Financial Control Systems/
KEN/INT/.
64. Papke, Tonia (FPMT). Control of Project Implementation Advances; 3 pp.
The system described for controlling project implementation advances is designed to be implemented in conjunction with the budget monitoring system (a separate document also prepared by a consultant to the Family Planning Association of Kenya).
FIN-Financial Control Systems.
TOOL/ FIN/ FIN-1/ FIN-3/ ENG/ Financial Control Systems/ KEN/
INT/.

65. Papke, Tonia. Cost Per Service Reporting. New York, New York: Management Development International; 1987; 9 pp.

The third in a series of exercises on budgeting skills, "this exercise is designed to provide mid level family planning managers with the skills needed to calculate and monitor cost per service for family planning services." The program budget and the actual costs are provided, giving the reader sufficient information to compare budgeted cost per service against the actual cost. The exercise takes the reader through the process step by step, however, some of the calculations depend on figures derived from the first two exercises in this series. N.B.: The other two exercises prepared by this author are entitled, "Introduction to Budgeting" and "Budgeting for Fixed and Variable Costs".

FIN-Budgeting.

EXER/ FP/ FIN/ FIN-1/ FIN-2/ FIN-4/ ENG/ Budgeting/ Capital and variable costs/ Recurrent or fixed costs/ Direct or indirect costs/ Fiscal techniques/ INT/.

66. Papke, Tonia (FPMT). Inter-Donor Accounting; 3 pp.

This draft report, prepared by an FPMT consultant for the Family Planning Association of Kenya, discusses a system for handling the accounts generated by funds from different donors.

FIN-Financial Control Systems.

TOOL/ FP/ FIN/ FIN-1/ ENG/ Financial Control Systems/ KEn/ INT/.

67. Papke, Tonia. Introduction to Budgeting. New York: Management Development International; 10 pp.

This exercise is designed to provide mid-level family planning managers with the budgeting skills needed to prepare an annual budget. Using background information and a series of forms that facilitate calculations, the reader is asked to prepare an annual budget for the clinic described in the exercise. NB: This is one of a series of three exercises prepared by this author. The others are entitled, "Budgeting for Fixed and Variable Costs" and "Cost per Service Reporting".

FIN- Budgeting.

Exer/ FP/ FIN/ FIN-1/ FIN-2/ FIN-4/ Eng/ Fiscal techniques/ Budgeting/ Program costs/ Capital and variable costs/ Direct or indirect costs/ Recurrent or fixed costs/ Unit costs/ INT/.

68. Papke, Tonia. Notes on Fundraising. London: International Planned Parenthood Federation; 1977; 39 pp.

This is a concise manual providing information on the basic principles of fundraising and the techniques that can be employed to successfully raise funds. Contents include: outlines for fundraising campaigns; methodology and ideas for events; sample fundraising and thank-you letters; and information on donations "in-kind." A discussion of the function of a resource development component in an organization is included, followed by a detailed series of questions that fundraisers must be able to answer in order to ensure a successful fundraising effort.

FIN-Shelf.

Man/ GNL/ FIN/ FIN-3/ ENG/ Fundraising/ In-kind donations/ INT.

69. PIACT. Assessing the Characteristics and Cost-effectiveness of Contraceptive Services: PIACT; 56 pp.

This paper presents a practical approach to assessing and comparing the cost-effectiveness of various contraceptive methods and delivery systems. Topics covered are: method attributes; delivery systems; use-effectiveness; and costs involved. The reader is then taken through a series of steps to estimate cost-effectiveness. Sample forms are provided to facilitate the calculations and could be used to create an exercise if used with data on contraceptive use in a specific country.

FIN-Resource Allocation.

MAN/ FP/ FIN/ FIN-2/ ENG/ Cost Effectiveness Analysis/
Contraceptive Methods/ Community Based Distribution Programs/
Contraceptive Technology/BB/ RTI/ INT/.

70. The Population Council. Studies in Family Planning; 1979-. The FPMT library contains issues of the bimonthly journal Studies in Family Planning, dating from 1979. An annual index lists articles published each year by author, subject and geographic area. The subject and geographic indexes list articles alphabetically by title. Studies in Family Planning is an international journal that addresses family planning and related health and development issues, with emphasis on activities in developing countries.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS M&E/ FIN/ IE&C/ INT/.

71. Price-Waterhouse. The Audit Committee: The Board of Trustees of Nonprofit Organizations and the Independent Accountant; 11 pp. Prepared by Price-Waterhouse, this working guide describes the role an independent accounting firm in conducting an audit for a non-profit organization. It contains recommendations on how non-profit organizations should structure an audit committee in order to serve as a link between the organization and the independent accounts. Further, the guide supplies a list of topics the audit committee might discuss with independent accountants, financial management representatives, internal auditors and others.

FIN-Accounting.

Read/ GNL/ FIN/ FIN-4/ Eng/ Fiscal techniques/ Accounting/ INT.

72. Primary Health Care Operations Research (PRICOR). Letter From Honduras: Financing Health Care. Tegucigalpa, Honduras: Ministry of Health of Honduras; 1 pg.

Briefly reports on the results of a household survey conducted in Honduras to identify alternative means of financing basic health services. Includes findings on household expenditures for illness, where the illness was treated, and expenditures for drugs.

FIN- Health Care Financing.

Read/ HLTH/ FIN/ FIN-3/ Eng/ Resource Development/ Health Care Financing/INT.

73. Pyhrr, Peter A. La Presupuestacion de Base Cero (Base Zero Budgeting). INCAE: Harvard Business Review; Dec 1970; 25 pp.
Note: Trans Olympia Vivas de Nanda, 1979.
The article, written by TI's chief of staff, gives a basic introduction to base zero accounting. Describes how to formulate, evaluate and put to effective use "decision packets".
FIN - base zero accounting.
TOOL/ GEN/ FIN/ SPA/ INT/ FIN - accounting/.
74. Pyle, David F. Indonesia: East Java Family Planning, Nutrition, and Income Generation Project: Kumarian Press; 1984; 27 pp.
This case provides a comprehensive look at an integrated project in Indonesia that combines family planning, nutrition, and income generation. Background is given on the country and the project, followed by a discussion of the culture and the role of women in Indonesia. The design, implementation, and progress of the project are described and supplemented by a series of tables. The reader can then use the material to assess whether the program is meeting the objectives, if further monies should be provided, and whether the program should be expanded.
FIN- Revenue Generation.
Case/ FP/ FIN/ FIN-2/ FIN-3/ Eng/ Family planning/ Income generation/ Women/ INT/ IND.
75. R. R. Nathan Associates. Cost-Effectiveness Analysis Field Manual. New York: PACT; 82 pp.
This manual provides a simple, how-to guide for determining the cost-effectiveness aspects of design, monitoring and evaluation of development projects. It covers: costs in comparison to community resources; the ratio of net benefits to costs; and the ratio of per unit costs. Four brief case studies and their solutions are included to give the reader an opportunity to practice these analysis techniques. There are also a series of fourteen workforms that facilitate data gathering and calculations and can be used as teaching tools.
FIN-Shelf.
Man/ Gen/ FIN/ FIN-2/ Eng/ Cost effectiveness analysis/ Resource allocation/ BB/ INT/.
76. Rees, P.H., and L.R. Bagg, D.P. Hansen, and J.J. Thuku. Medical Care in a Tropical National Reference and Teaching Hospital: Outline Study of Cost-effectiveness. British Medical Journal; 8 July 1978; Volume 2: pp 102- 104.
Reports on a prospective audit to assess the cost-effectiveness of treatment in three different wards in a large tropical teaching hospital. A review of the methods utilized to conduct the audit are reviewed and tables help to substantiate the results of the study.
FIN-Resource allocations.
Read/ HLTH/ FIN/ FIN-2/ Eng/ Resource allocation/ Cost effectiveness analysis/ INT.

77. Russell, Sharon Stanton and Jack Reynolds. Community Financing of Primary Health Care: A Research Priority: Chapter 1; 6 pp. (PPICOP Monograph Series; (Issue Paper 1)).

This chapter serves as an introduction to a monograph on community financing. It provides a clear and concise overview of the concept of community financing and the role it can play in a health care system. It describes the various sources of both public and private sector health care financing. Included, is a brief discussion tracing the evolution of community financing from Classical Greece and Rome, which could provide a trainer with material for an introduction "lecturette" on community financing. NB: There are a series of tables illustrating an evaluation of various community financing methods that could be used in conjunction with this chapter. They are listed as "tools" in the index and from Wayne Stinson's report on Community Financing.

FIN- Health care financing.

READ/ HLTH/ FIN/ FIN-3/ ENG/ Resource development/ Health care financing/Community financing/ INT.

78. Shepard, Donald. with the research assistance of George A. Mensah. The Danfa Project. Boston, MA: Harvard School of Public Health; February, 1983; 12 pp.

This case focuses on a project in Ghana that was designed to determine the best method to deliver family planning services. The project delineated four geographic areas, each one having a different mix of the following services: comprehensive health care; health education; family planning; and standard MOH services. Information and data furnish the reader with the information necessary to complete the attached assignment. The assignment asks the reader to give outcome indices that can be used in analyzing family planning interventions (eg: births averted); calculate costs and effectiveness; consider what outputs from the project should be considered for policy development; and assess how the characteristics of the four areas studied may bias the result. Finally the reader is asked to recommend an approach for family planning programming in Ghana based on various criteria and to determine how that recommendation would be altered if funds were unlimited and if funds were very limited. NB: There is a case on Village Health Workers in Honduras that covers many aspects of resource allocation.

FIN- Resource allocation.

Case/ FP/ FIN/ FIN-2/ Eng/ Cost effectiveness analysis/ Resource allocation/ Service delivery systems/ GHA/ INT.

79. Shepard, Donald S., Layes Sanoh, and Emmou Coffi. Cost-Effectiveness of the Expanded Programme on Immunization in the Ivory Coast: A Preliminary Assessment. *Social Science Medicine*; 1985; No. 00 (No. 00): pp 1-9.

Using an expanded immunization program in the Ivory Coast this article serves as a detailed example of cost-effectiveness and cost-benefit analysis. Includes a discussion of the actual costs, discounting, program effectiveness, and methods used to establish the economic value of averting a death. While not specific to family planning applications, the article does discuss multiple variables affecting cost effectiveness and cost benefit analysis.

FIN- Resource allocation.

Read/ HLTH/ FIN/ FIN-2/ Eng/ Cost benefit analysis/ Cost effectiveness analysis/ Child mortality/ INT/ IVC.

80. Shepard, Donald S. and Mark S. Thompson. First Principles of Cost-Effectiveness Analysis in Health. *Public Health Reports*; Nov/ Dec 1979; Volume 94 (No. 6): pp 535-543.

This article introduces the reader to the concept of cost-effectiveness analysis. The principles of cost-effectiveness analysis are described and diagrammed as a five-part process: 1) defining the program; 2) computing net costs; 3) computing net health effects; 4) applying the decision rules; and 5) performing a sensitivity analysis. One hypothetical, and two actual applications of cost effectiveness analysis are presented and the calculations are included. The article concludes by discussing the strengths and limitations of using this analysis technique.

FIN- Resource allocation.

Read/ HLTH/ FIN/ FIN-2/ Eng/ Cost effectiveness analysis/ Resource allocation/ INT.

81. Shepard, Donald, Stephen J. Lerman, and Richard A. Cash. *The Cost of an Oral Rehydration Therapy Programme: A Manual for Managers*. Boston, MA: Harvard School of Public Health; 1985; 46 pp.

This manual was written as a practical guide to managers who control diarrheal disease programs. It aims to give a manager who is lacking an extensive accounting or economics background, the competence to analyze the costs of an oral rehydration therapy program. While the subject matter is an ORT program, this comprehensive and clear manual touches on many aspects affecting the financial management of health programs. Some of the areas covered are: full cost-accounting (capital and recurrent costs); cost allocations; categorizing costs; handling capital costs; and steps in cost analysis. There are a number of worksheets provided that illustrate the methods involved in calculating the various capital and recurrent costs of the program and the annual program costs for personnel, drugs, supplies, etc.

FIN- Cost analysis.

Man/ HLTH/ FIN/ FIN-2/ Eng/ Fiscal techniques/ Cost analysis/ Accounting/Capital and variable costs/ Recurrent and fixed costs/

Program costs. INT.

82. Simini, Joseph Peter. Cost Accounting Concepts for Non-Financial Executives. New York: Amacom; 1976; 162 pp. Written for managers with little or no background in accounting, this book explains the basics of cost-accounting in non-technical language. Geared to the profit sector, it covers such topics as: the different cost systems and the circumstances under which each is used; the uses of absorption and direct costing; the development and application of standard costs; plus information on how to structure and report cost data. Problems and answers are provided so the reader can test his understanding of the material presented in the text. NB: It is possible that the questions included at the end of each chapter could be adapted for training purposes.

FIN-Shelf.

Book/ GNL/ FIN/ FIN-1/ FIN-4/ ENG/ Fiscal Techniques/ Accounting/ UST/.

83. Stern, Rolph. FamiPlan; 8 pp.

The executive director of a family planning program that depends on outside sources for its funds receives a letter notifying him that his funding has been cut.

FIN - funding.

CASE/ FP/ FIN/ PLN/ SPA/ INT/ funding/.

84. Stinson, Wayne. Community Financing. Washington, DC: American Public Health Association; 1982; 90 pp. (Primary Health Care Issues; Series 1; (Number 4)).

This very thorough paper discusses strategies for community financing of primary health care, focusing on resource mobilization and emphasizing community participation. It describes ways that users of public health services have helped to defray one-time and recurrent costs and how these contributions fit into the overall picture of primary care financing. The report uses information collected from over one hundred projects and programs in the developing world to recount where and how community financing methods have been attempted, what costs they have defrayed, and what kind of extracommunal assistance they have needed. It is designed to help readers fit community financing into an overall financing plan and to suggest ways in which community schemes can be implemented. This comprehensive booklet includes a series of tables that illustrate an evaluation of various financing methods and could be utilized as a teaching tool to explore the strengths and weaknesses of different alternatives for community financing.

FIN- Health Care Financing.

Read/ HLTH/ FIN/ FIN-3/ ENG/ Resource development/ Health care financing/User financing/ Donations/ Community financing/ INT.

85. Stinson, Wayne. Tables from Community Financing of Primary Health Care. Washington, DC: American Public Health Association; 1982; 3 pp.

The tables have been copied from Wayne Stinson's comprehensive paper on community financing. They illustrate the following: Table 3.2- Economic Evaluation of Alternative Community Financing Methods; Table 3.3- Effects of Alternative Community Financing Methods on the Scope and Accessibility of Primary Health Care Services; and Table 3.6- Overall Evaluation of Community Finance Alternatives. Trainers could use these tables in a variety of ways, including providing participants with the basic format, and having them supply the information to fill in the columns, or by having them share examples from their own experience.

FIN- Health Care Financing.

Tool/ HLTH/ FIN/ FIN-3/ Eng/ Resource development/ Health care financing/ Community financing/ Income generation/ Prepayment plans/ Social security financing/ User financing/ Fee for services/ Contraceptive sales/ Donations/ In-kind donations/ Fundraising/ INT.

86. Svendsen, Dian Seslar; Sujatha Wijetilleke. Navamaga: Training Activities for Group Building, Health and Income Generation. Washington, DC: The Overseas Education Fund; 1983; 156 pp.

Note: 4 copies: 2 English, 1 French, 1 Spanish.

This handbook was developed in Sri Lanka as a component of a project to train field workers and grass roots development workers to effectively involve women in health and income generation projects in their communities. The purpose of this handbook is to train the field workers how to do the following: "how to effectively tap resources; how to present technical information through methods other than lectures; how to involve villagers in action and problem solving ; and how to guide villagers to explore options and make decisions." The handbook contains many exercises to be used by field workers to help the villagers: "assess their personal and family needs; improve their skills in working cooperatively; to identify personal and community goals; to explore income generation possibilities; and to identify family and community health and nutrition problems." The final section of the book focuses on planning and includes exercises to enable villagers to plan and implement a project. Each exercise in the book is clearly written and contains notes on the purpose, materials needed, time needed, and the process. The exercises can be readily adapted to fit the specifics of the community. While written for a literate audience, suggestions are given as to how to use the materials with semi or pre literate groups. This handbook can serve as a comprehensive resource for training community level workers and can be used by trainers of mid and senior level managers to illustrate the range of approaches, activities, and methodologies that can be employed in community development, health and income generation projects.

TOT-Shelf.

EXER/ TOOL/ COURSE/ HLTH/ PLN/ PLN-3/ PLN-4/ PLN-5/ HRM/ FIN/

TOT/ ENG/ FRE/ SPA/ Goal Setting/ Implementation/ Community/
Women/ Women's Programs/ Needs Assessment/ Community Financing/
Income Generation/ Interpersonal Communications/ Decision Making/
Resistance to Change/ Teaching Methodologies/ EE/ INT.

87. Thornburg, Ann. Introduction to Accounting; 25 pp.
This was designed as a review for a course on basic accounting
skills. Divided into five parts, it covers: the essentials of
accounting; the accounting process; non-profit accounting;
revenues and expenses; and analysis of financial statements.
Definitions of terms and concepts are provided as well as a
description of the actual techniques and procedures and rules
governing the accounting process. This could be very useful to a
trainer who is developing a course on basis accounting.

FIN- Accounting.
Course/ GNL/ FIN/ FIN-1/ Eng/ Accounting/ Cost analysis/ Fiscal
techniques/ Capital and variable costs/ Direct and indirect
costs/ Recurrent and fixed costs/ Unit costs/ Program costs/ INT.

88. Thornburg, Ann. The Operating Budget: Necessary Evil or
Indispensable Management Tool?; 17 pp.
Designed to be used a series of overhead transparencies for a
course module on operating budgets, these sheets provide a
concise and thorough overview of the function of budgets. Topics
covered are: budget as a management tool; the budget process;
characteristics of an effective budget; and zero-based budgeting.
These can be used by a trainer as an outline for a course module
on budgeting, and as transparencies or handout material.

FIN- Budgeting.
Course/ Tool/ GNL/ FIN/ FIN-1/ FIN-2/ Eng/ Fiscal techniques/
Budgeting/ Cost analysis/ Program costs/ Capital and variable
costs/ Direct and indirect costs/ Recurrent and fixed costs/ Unit
costs/ INT.

89. Toben, Mauricio. under the supervision of: David W. Young.
San Fernando Hospital. Boston, MA: Harvard School of Public
Health; 1984; 6 pp.
This case describes a large psychiatric hospital in Mexico City.
The hospital's General Director is required to develop a system
to measure costs at the hospital in order to facilitate cost
control. With the information provided in the text and in the
exhibits, the participant is asked to assess what steps are
involved in determining costs and to try and compare the new
system with the previous system. The participant is then asked
to examine the merits and the utility of the system.

FIN-Cost Analysis.
Case/ HLTH/ FIN/ FIN-1/ Eng/ Cost analysis/ Fiscal techniques/
Program costs/INT/ MEX.

90. Traitongyoo, Tavatchi. A Look at a Successful Fee-Charging Urban Project. JOICFP Review; October, 1985; Volume 10: pp.32-34.

Note: There is a film available through the Pathfinder Fund illustrating the family planning program in Thailand.

Briefly reviews the successful Thai family planning program and how it has adapted to include other health services. The article describes the composite of funding mechanisms that support the program, and some of the marketing techniques used to promote the program. The innovative techniques described in this article can be useful for stimulating discussion.

FIN- Revenue Generation.

Read/ FP/ FIN/ FIN-3/ Eng/ CBD programs/ Fee for services/ User financing/ Community financing/ Contraceptive sales/ Communication strategies/ INT/ THA.

91. Una Revision de Esquemas de Financiacion para Programas de Planificacion (A Review of Financing Schemes for Family Planning Programs); 38 pp.

The article provides an overview of 10 different means of financing a FP program. Divided into 4 sections - 1) Financing through sales and fees, 2) through contributions and donations, 3) through commercial operations and 4) financing from the community. The article gives the experiences and recommendations of Pathfinder where applicable.

FIN - financing.

TOOL/ FP/ GEN/ FIN/ SPA/ financing/ family planning/ INT.

92. Vengroff, Richard (Center for Applied International Development Studies -Texas Tech University). Simulation - Development Planning And The Local Budget In The Republic Of Pedogogia. West Hartford, Connecticut: Kumarian Press; 1983; 19 pp.

This is a simulation exercise that focuses on the local level budgeting process for development projects. Designed for a group of at least ten, the exercise takes about ninety minutes to do, plus the time needed for an introduction and the follow-up discussion. The author provides: directions for the instructor; instructions for the simulation; all necessary background information on a fictitious country; descriptions of the roles participants must play; and directives and memoranda relevant to the exercise. While the emphasis is on development, and not specifically on health, the issues raised about resource allocation and the budgeting process may be readily applicable to family planning managers from developing countries.

FIN-Shelf.

EXER/ GNL/ FIN/ FIN-1/ FIN-2/ ENG/ Resource allocation/ Budgeting/ INT.

93. Vriesendorp, Sylvia and Deirdre Strachan. A Review of Financing Schemes for Family Planning Programs. Chestnut Hill, MA: The Pathfinder Fund; November, 1984; 27 pp. This paper provides an overview of ten different approaches to financing family planning service delivery programs. Although most of the approaches are oriented toward private sector programs, some could be used by the private sector as well. The paper divides the approaches into four sections: 1) user financing through contraceptive sales and fee for service; 2) contributions and donations, including in-kind contributions, fundraising, loans and grants; 3) commercial operations; and 4) community financing. Within the discussion of each approach examples are given and recommendations are made. FIN- Health care financing. Read/ Tool/ FP/ FIN/ FIN-3/ Eng/ User financing/ Contraceptive sales/ Fee for services/ Donations/ In-kind donations/ Fundraising/ Loans and grants/ Community financing/ INT.

94. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Financial Management Control: No Need For Strong Arm Tactics. Boston, Massachusetts: Management Sciences for Health; 1987; 6 pp. Note: This case is currently under development. In this case a new financial manager has been hired to develop a financial management system for an urban based community distribution project of the National Family Planning Program. The case is divided into three sections. In the first section, the new officer outlines his principal objectives for the new system, and prepares a rough draft of the elements in the system. At this stage the reader is asked to design a financial system for the CBD program. In the second section, the system that the financial officer has developed to track each financial transaction in the CBD program is detailed. The reader is asked to compare this with the system created in the first section of the case and to identify potential problems. In the final section, the financial officer has implemented the system and is trying to solve some of the problems with the system. The case teaching objectives include: understanding how to analyze a financial control system; understanding how to develop reporting procedures for all organizational levels; and realizing the difficulties in implementing a system of strict financial controls. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case. CASE/ FP/ FIN/ FIN-4/ ENG/ Financial planning and management/ Fiscal techniques/ INT/.

95. World Health Organization. Strengthening Ministries of Health for Primary Health Care; 58 pp.

"This comprehensive publication offers general concepts intended to stimulate exploration on ways to strengthen Ministries of Health. It presents approaches to the analysis of Ministries of Health, organizational options for the implementation of primary health care, and some general ideas on planned processes of organizational change."

PLN-Needs Assessment.

READ/ HLTH/PLN/ HRM/ PLN-4/ PLN-5/ PLN-6/ ENG/ THA/ YEM/ FIN/ MOZ/ CHL/ GHA/ INI/ PHI/ SUD/ SRL/ TUR/ INT/ Needs Assessment/ Public Sector Programs/ Government Agencies/ Ministry of Health/ Political Bodies/ Organizational Development/.

96. Yinger, Nancy, Richard Osborn, David Salkever, and Ismail Sirageldin (The Johns Hopkins University). Third World Family Planning Programs: Measuring the Costs. Washington, DC: Population Reference Bureau, Inc.; February, 1983. (Population Bulletin; Vol. 38; (No. 1)).

This bulletin explains and demonstrates the use of cost-benefit analysis and cost-effectiveness analysis in evaluating family planning programs in developing countries. The bulletin includes nine case studies set in Brazil, Colombia, Ghana, Haiti, India, Thailand, and Zaire. They are presented to demonstrate what cost-effectiveness analysis has revealed about the following issues: integration of family planning with health services; use of paramedical staff; and community-based distribution as a technique to promote contraceptive use. Figures, tables, and technical boxes throughout the text, can be used in discussion.

FIN-Resource Allocation.

Read/ Case/ FP/ FIN/ FIN-1/ FIN-2/ Eng/ Resource allocation/ Cost benefit analysis/ Cost effectiveness analysis/ Integrated programs/ Auxillary personnel/ Community based distribution programs/ BRA/ COL/ GHA/ HAI/ IDI/ THA/ ZAI.

97. Young, David W. Afrtrain-Cameroon. Boston, MA: Harvard School of Public Health; 1983; 5 pp.

Designed to serve as the basis for a class discussion, this case describes an African Training PVO experiencing cash flow problems due to the lag time in receiving monies from its overseas headquarters. An income statement, balance sheet, and a projection of requirements for trainees and personnel, provide data for discussing the case and give participants an opportunity to practice skills in reading these sheets and utilizing the information they contain.

FIN- Cost analysis.

Case/ HLTH/ FIN/ FIN-1/ Eng/ Accounting/ Cost analysis/ Private non-profit/ Fiscal techniques/ INT/ CAM/.

98. Young, David W. Clinique Nosral. Boston, MA: Harvard School of Public Health; 1984; 6 pp.

This case asks the reader to assess the factors contributing to cost overruns in a rural clinic in Lower Volta. Background information on the country and the health system are provided with a description of how the clinic is staffed and operated. Four exhibits are included to give the reader data on: 1) the organizational structure of the clinic; 2) the expected and actual number of visits and medical supply costs for one year; 3) the estimated and actual visit time requirements; and 4) the clinic budget. The clinic director has been asked to reduce the overruns and to prepare a report describing her activities. This case could be used as the basis for class discussion and/or students could be asked to prepare a written assignment. It provides the reader with an opportunity to use some financial analysis tools as the basis for management decisions.

FIN- Cost analysis.

Case/ HTLH/ FIN/ FIN-1/ FIN-2/ Eng/ Fiscal techniques/ Cost analysis/ INT.

99. Young, David W. Financial Control in Health Care: A Managerial Perspective. Homewood, Ill: Dow Jones-Irwin; 1981: pp. 125- 136; 12 pp.

This chapter discusses budgeting as a management tool in health care organizations. The author defines and diagrams the budget process showing how the success of budgeting as a management tool is dependent on a series of factors. These factors are described in detail and examples are given to illustrate how frequently the budget process is a "misfit" with management objectives.

FIN- Health Care Financing.

Read/ HLTH/ FIN/ FIN-1/ FIN-2/ FIN-4/ Eng/ Budgeting/ Fiscal techniques/ INT.

100. Zschock, Dieter K. Current Problems and Future Prospects of Medical Care Under Social Insurance in Latin America; 12 pp.

Some thoughts and propositions on the coordination of medical care under public health and social insurance programs in Latin American countries (especially low-income areas). Includes a brief section on the coverage, organization and financing of medical care under social insurance. Could be used as a starting point for class discussion. Audience; policy makers.

FIN-Health Care Financing.

READ/ HLTH/ FIN/ FIN-3/ ENG/ Social Security Financing/ Health Care Financing/ Financing/ LAC/ INT/.

FPMT LIBRARY - HUMAN RESOURCE MANAGEMENT

1. The 1988 Annual - Developing Human Resources. San Diego, California: University Associates, Inc.; 1988; 293 pp. (J. William Pfeiffer. Series in Human Resource Development).
Published annually, this volume contains three distinct sections for use in human resource development. The first section contains twelve structured learning experiences focusing on a number of different topics. Each structured experience "contains a description of the goals of the activity, group size, time, and materials needed, and directions for the facilitator." Section II contains four instruments provided for training and development purposes. The final section contains fifteen articles written for professionals in the human resource development field.
HRM-Shelf.
READ/ EXER/ TOOL/ GNL/ HRM/ HRM-5/ HRM-10/ ENG/ Staff Development/ Organizational Development/ Management Style/ INT/ BB/ RTI.
2. Alan Guttmacher Institute. International Family Planning Perspectives; 1986-.
Published quarterly by the Alan Guttmacher Institute, this journal contains articles and special reports on international family planning topics.
REF-Shelf.
READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.
3. Algunos Conceptos Sobre el Proceso de Gerencia (Some Concepts Basic to the Process of Management; 7 pp.
Author gives nine elements of the executive process and a guide to their utilization. With graphics on the process.
HRM - Management.
TOOL/ GEN/ HRM/ SPA/ management/ INT.
4. Anker, Herman (Harvard University). Pine Grove Health Center. This case focuses on resolving interpersonal conflicts within a health care setting. The reader is provided with background information on the organization of the health center, and a sequence of the events that define the current problem. Three questions are posed which require the reader to examine the role of the different level managers both in resolving this conflict, and in reducing the chance of subsequent conflict within this setting. This case could be used as the basis for a classroom discussion or as a prepared assignment.
HRM-Managing Conflict.
CASE/ HEALTH/ HRM/ HRM-1/ HRM-9/ ENG/ Conflict Resolution/ Management Style/ Supervision.

5. Anonymous (Harvard School of Public Health). The Aga Khan Health Services: Monitoring Lady Health Visitors in Pakistan. Boston, MA: HSPH; April 26, 1985; 27 pp.

This case describes the rural health system in Pakistan detailing the organizational structure, and the systems for monitoring, supervision and logistics. Due to continuing expansion and heavy utilization, the current monitoring and evaluation system doesn't adequately serve the needs of management or the Lady Health Visitors who deliver the bulk of health services and is asked to address the following: 1) What are the objectives of the central health board of Pakistan for the monitoring and evaluation system, both internally and with organizations outside Pakistan?; 2) What are the major problems with the current non-clinical reporting system?; 3) What changes would you recommend to the monitoring evaluation system?; 4) How would you revise the monthly activity report of the LHV?; and 5) What are the benefits and resources required for this proposed system? Included are copies of: organizational charts; forms used at clinic level to record patient information; and monthly and annual activity reports submitted by personnel at the different levels of the system. The responses to the questions could be prepared individually or by small groups and then presented for discussion.

M&E- Management Control Systems.

CASE/ HLTH/ M&E/ HRM/ LOG/ M&E-3/ M&E-4/ M&E-5/ ENG/
Organizational Design/ Supervision/ Logistics/ Data Sources and
Collection Methods/ Evaluation/ PAK/ INT/.

6. Anonymous. The Competency Model Method; 5 pp.

This piece is a discussion of a needs assessment methodology called the competency model. Included is a description of the process and some suggestions for applying this methodology. The concluding section lists the advantages and disadvantages of this method. NB - There is a related piece called "Problem Analysis Method", filed under PLN- Needs Assessment.

PLN-Needs Assessment.

TOOL/ GNL/ TOT/ HRM/ PLN/ PLN-4/ ENG/ Needs Assessment/ Operating
Procedures/ Organizational Diagnosis/ Interpersonal
Communications/ INT/.

7. Anonymous. La Cooperative AD; 3 pp.

This case describes the first few months in the life of a manager of an agricultural supplies cooperative, who is new to the job. It can be used to introduce the concept of management and the task of a manager. The case touches on the following issues: what is management; what does a manager do; delegation; supervision; planning; personnel management; financial management; etc.

HRM-Management, General.

CASE/ GNL/ HRM/ HRM-1/ FRE/ Management functions/ Management
style/ AFR/ INT/.

FPMT LIBRARY - INFORMATION, EDUCATION AND COMMUNICATION

1. ABEPF. Manual para Utilizacac de Materiais de Informacao e Orientacao em Planejamento Familiar. Rio de Janeiro, Brazil: ABEPF; 1987; 67 pp.
Note: Cadernos ABEPF, Serie Manuais, 3.
IEC-Shelf.
POR/ IEC/ INT/.
2. Bogue, Donald J. Twenty-Five Communication Obstacles to the Success of Family PLanning Programs. Community and Family Planning Study Center: University of Chicago; 1975; c1975; 84 pp.
Note: Media Monograph 2.
IEC-Shelf.
IEC/ FP/ ENG/.
3. Byker, Donald. Nota Sobre Presentaciones Orales (Note on Oral Presentations). INCAE: Harvard College; 1980; 12 pp.
Note: Trans Eva Abreu, INCAE.
The article gives the details with organization as a basis for developing a clear presentation and gives specific suggestions for effective delivery.
IEC - oral presentation.
TOOL/ GEN/ IEC/ SPA/ oral presentation/ INT/.
4. Byker, Don, Frank V. Cespedes and Linda Micheli. Una Nota Sobre Comunicacion para Gerentes (A Note on Communication for Managers); 15 pp.
The author discusses three means of developing of communication; through the "mathematical theory", rational persuasion, and identification of a common language.
IEC - communication.
TOOL/ GEN/ IEC/ SPA/ IEC - communication/ INT/.
5. Coeytaux, Francine, and Taoufik Kilini, Margaret McEvoy. Outreach: A Luxury Or A Neccessity? A Quantative Look At Mobile Family Planning Services In Tunisia. Boston, MA: Pathfinder Fund; November 19, 1985; 8 pp.
This is a report on an operations research study which "succeeded in isolating and measuring the impact of IEC outreach on the use of family planning services in Tunsia". Background information on the project is given, followed by a discussion of the methodology and the results of the project. The report concludes with a discussion of the use of mobile units and how IEC has been added as an effective component of these units.
PLN-Mobile Units.
READ/ FP/ IEC/ PLN/ PLN-4/ ENG/ Operations Research/ IE&C/ Mobile Units/ TUN/ INT/.

Activities; 5 pp.

Note: This is taken from CEDFA'S Nutrition Manual.

This hour long exercise focuses on community participation and demonstrates the advantages of working with the community to plan and carry out action projects. While the context of this exercise is nutrition, it could be readily adapted to family planning. It is an easy exercise and could be introduced at an early stage of a training program to illustrate this concept, and to help in group building and in facilitating group process.

POL-Community Participation & PLN-Program Cycle.

EXER/ HLTH/ POL/ PLN/ POL-2/ POL-3/ PLN-2/ PLN-3/ PLN-5/ ENG/ Community Participation/ Communication process/ Nutrition/ IEC Programs/ Program Design/ INT.

7. Dunand, Marcel. Tselentis, Maria. Haciendo Su Presentacion de Negocios Efectiva y Amena, Comunicarse para "Vender un Mensaje" (Making Your Business Presentation Effective and Enjoyable, Communicate to "Sell a Message"): INCAE; 1984; 76 pp.

Note: Trans Ilse Kriebel, INCAE.

A basic, step-by-step guide to presenting clear and interesting business presentations. Much of the article is graphics.

IEC.

TOOL/ GEN/ IEC/ SPA/ INT/.

8. Dunand, Marcel. Produccion de la Version Final (Production of the Final Version): INCAE; 28 pp.

A step-by-step guide to polishing a presentation, through structuring, division into manageable portions and inclusion of graphics, with six pages of sample graphics.

IEC - presentation graphics.

TOOL/ GEN/ IEC/ SPA/ INT/ presentation graphics/.

9. Dunand, Marcel. Visualizar Datos Para Mejorar el Impacto de la Comunicacion (Visualize Data to Improve Communication Impact): INCAE; 1984; 126 pp.

Note: Trans Ilse Kriebel.

The article, almost entirely in graphics, is intended to provide examples and guidance in making diagrams and graphics for a presentation so that they are clear and hold interest. Many different means of graphing data and displaying structure are included.

IEC - graphic presentations.

TOOL/ GEN/ IEC/ SPA/ INT/ graphic presentations/.

10. El-Bushra, Judy; Susan Perl. Family Planning Education in Action: Some Community-Centered Approaches. International Planned Parenthood Federation. Great Britain: Typographic Press Limited; March 1976; c1976; 102 pp; ISBN 0-900524-71-3.

IEC-Shelf.

IEC/ ENG/ CASE/ IDI/ PAK/ KON/ IND/ GHANA/ KEN/ NIR/ COL/ DOR/ COS/ HON/ GRB/ LAC/ AFR/ EUR/ ASI/ INT/.

11. Elkamel, Farag, Ph.D. Developing Communication Strategies and Programs: A Systematic Approach. Cairo, Egypt: UNICEF and The Centre for Development Communication (CDC); 1986; 98 pp.

Note: 1 ENG and photocopy of FRE draft.

"The objective of this clearly written handbook is to improve the effectiveness of development programs through appropriate use of communication and social marketing strategies and techniques. The book is intended to respond to the following specific needs in developing effective communication programs. First, it should serve as a guide to plan and implement such programs. Secondly, it can be used as an evaluation and monitoring tool. Third, it can be used as a text for training workshops designed to improve communication skills, particularly with relevance to public health issues." The book includes a number of training tools and instruments. Among those included are: a managers check list to help assess program progress which is located at the end of each chapter; exercises; sample questionnaires; sample proposal requests; and an appendix on media selection and mix. The handbook concludes with a selected bibliography. NB: This handbook is the basis of an audio-visual package that should be available soon from UNICEF.

IEC-Shelf.

MANUAL/ TOOL/ EXER/ READ/ HLTH/ IEC/ IEC-1/ IEC-2/ IEC-3/ M&E/ PLN/ ENG/ FRE/ Social Marketing/ Media Choice/ Communication/ Communication Strategies/ Health Education/ Program Evaluation/ Marketing/ Competitive Strategy/ Market Research/ BB/ INT/.

12. Ewing, David W. Estrategias para Persuadir (Strategies for Persuasion). New York: J. Wiley & Sons; 1974; 14 pp. (Writing for Results).

Guidelines for writing or speaking, and how to develop an effective piece that will not confuse, bore or otherwise alienate the audience, nor diminish the author/speaker's credibility.

IEC - writing, speaking.

TOOL/ GEN/ IEC/ SPA/ INT/ writing/ speaking/.

13. Gallen, Moira E., M.A. and Ward Rinehart, M.A. Operations Research: Lessons for Policy and Programs. Population Reports ed. Baltimore, Maryland; May-June 1986; 38 pp.

"This issue of "Population Reports" discusses ... the findings of about 140 recent USAID and WHO - supported projects in about 50 developing countries that are considered operations research... Operations Research has gradually evolved from a strong policy-oriented technique to a more program oriented approach... Emphasis now is more on practical ways to develop better management of FP and health services..." The major topics covered by the paper are: delivery systems; method choice; community workers; training and supervision; IE and C; Integration of service delivery; community participation; fees and financing; cost-effectiveness of programs; and application of operations research findings. Throughout the text are blocks of highlighted information on the more technical aspects of operations research: how it is conducted; putting the findings into practice; and new directions. A table that allows for some comparison of completed operations research projects between 1974-1986, concludes the paper. Trainers could use this as a background reading on operations research or on any of the specific topics listed above. The text is illustrated with examples drawn from many countries and projects around the world.

PLN-Operations Research.

READ/ TOOL/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ IEC/ Health Care Financing/ Fee For Services/ Operations Research/ Cost Effectiveness Analysis/ Integrated Programs/ Contraceptive Methods/ Community Health Workers/ Problem Identification/ Program Planning/ Implementation/ Service Delivery Systems/ INT/.

14. Gillespie, Robert. A Manual on Evaluation of Population Communication Programmes/ Manuel pour l'évaluation de communication sociale en matière de population. France: UNESCO; 1981; ISBN 92-3-101559-5.

Note: 2 copies: 1 English, 1 French.

IEC-Shelf.

IEC/ ENG/ FRE/ INT/.

15. Gillespie, Robert W. (Population Communication). A Review of Incentives and Disincentives in Developing Countries. Pasadena, CA: Population Communication; 1985; 22 pp.

This paper begins by providing the background rationale for incentives, the definition of incentives and disincentives and the scope of paper. The paper then explores the factors governing small family policies, the objectives, target groups. In considering small family options, the reader is provided with a series of preliminary questions to design small family policies and programs. The question, what can be done now?, is reviewed. Merchandising and marketing small family concepts, Management and verification, and Small Family Policies. The policies of China, Egypt, Korea, Singapore, and India are outlined.

POL-(Dis)incentives.

READ/ FP/ POL/ POL-3/ ENG/ Population policy/ Family planning policy/ Incentives/ Disincentives/ IEC programs/ Needs assessment/ Marketing/ Market surveys/ Program evaluation/ Community participation/ Communication research/ INT/ FRC/ EGY/ KOS/ SIP/ IDI.

16. Hubley, J.H. Barriers to Health Education in Developing Countries. Health Education Research; 1986; 1(4): 233-245. This article is a review of the following barriers to effective health education programs: failure in the planning process to apply epidemiological and behavioral sciences to the selection of appropriate objectives; communication failure in reaching the intended audience and promoting understanding and acceptance of messages; failures in the organization of health education services and the weak status of the specialist health educator; and failure in the evaluation process and the dissemination of research into decision making. Several innovative health education approaches are reviewed and suggestions made for fruitful topics for future research and evaluation studies. This document is useful as a handout to complement any session on IEC or more specifically, as an outline for a session on how to increase the chances of success for IEC activities. IEC-Health Education.

READ/ HLTH/ IEC/ IEC-2/ ENG/ Program planning/ Communication research/ Communication strategies/ Target group/ INT.

17. International Contraceptive Social Marketing Project. Contraceptive Social Marketing Detailer's Manual. Washington, D.C.: The Futures Group; 10 sections. IEC-Shelf. IEC/ ENG/.

18. International Contraceptive Social Marketing Project (ICSMP). Determining Pricing Policies in Contraceptive Social Marketing. Washington, DC: The Futures Group; 102 pp. This document begins by describing the process by which prices for contraceptives can be set. The detailed steps are: 1) to evaluating the price sensitivity of relevant publics; 2) determining pricing objectives; 3) evaluating the price sensitivity of target markets; 4) selecting a pricing strategy; 5) choosing pricing tactics; and 6) implementing pricing policy. Following this is a section that reviews contraceptive social marketing projects undertaken in different countries. The data from these projects is presented and analyzed, and sample surveys are provided to illustrate aspects of data collection. FIN- Pricing/ Cost Recovery. Man/ FP/ FIN/ FIN-3/ Eng/ Pricing policies/ Contraceptive sales/ IEC programs/ Social marketing/ INT/ JAC/ MEX/ COL/ ELS/ EGY/ GHA/ BAN/ NEL/SRL/ IDI.

19. International Council on Management of Population Programmes. Population Manager. Malaysia: ICOMP; June 1987; 44 pp. (ICOMP Review; Vol. I; (No. 1)).
IEC-Shelf.
IEC/ ENG/.
20. Kiani, Aquila (Social Research Centre University of Karachi). Manual for Motivators for Action Programmes in Family Planning. Karachi: NGO's Coordinating Council for Population Welfare; August 1985; Orject No. SRS-PAK-26-69; 63 pp.
IEC-Shelf.
IEC/ ENG/.
21. Kincaid, D. Lawrence, Wilbur Schramm. Fundamental Health Communication. Honolulu, Hawaii: East-West Center, East-West Communication Institute; 1975; 197 pp. (John Middleton. Professional Development Modules; Module Text).
This module focuses on the role of communications in family planning. Text and a series of exercises cover basic communications principles and how communication can be used to promote change. Designed to be used as a self paced learning module, trainers could also use the exercises and text to prepare training sessions exploring communications as a component of family planning programs.
IEC/ Shelf.
COURSE/ EXER/ FP/ IEC/ IEC-3/ ENG/ Communication Strategies/ Media Choice/ Message Design/ Population Education/ INT/.
22. Kirkpatrick, J. Stephen. The Magic of Structure: A Manual for Planning and Evaluating Family Planning Education Programs. New York: Planned Parenthood Federation of America; 1981; 10 sections.
IEC-Shelf.
IEC/ ENG/.
23. Kumar, Krishna (Burea for Program and Policy Coordination, A.I.D.). Conducting Group Interviews in Developing Countries: A.I.D. Program Design and Evaluation Methodology Report No. 8. Washington, D.C.: Agency for International Development; April 1987; 44 pp.
PLN-Shelf.
PLN/ M&E/ MIS/ Data Collection/ Needs Assessment/ IEC/ Focus Groups/ ENG.
24. Levin, Harry L.: Robert Gillespie. The Use of Radio in Family Planning. Oklahoma: A World Neighbors Publication; 160 pp.
IEC-Shelf.
IEC/ ENG/ INT/.

25. Lieberson, Joseph, Devorah Miller, David Eckerson and Howard Keller. An Evaluation of the Factors of Sustainability in the Gambia Mass Media and Health Practices Project. Washington, DC: U.S. Agency for International Development; December 1987; 38 pp. (A.I.D. Evaluation Special Study No. 51).
IEC-Shelf.
IEC/ ENG/.
26. Lluvia de Ideas (Brainstorming); 2 pp.
A brief introduction to the practice and use of group brainstorming.
IEC - brainstorming.
TOOL/ GEN/ IEC/ SPA/ INT/ brainstorming/.
27. Manoff, Richard K. Social Marketing: New Imperative for Public Health. New York: Praeger; 1985; 293 pp.
This comprehensive book is written to help the reader to "[apply social marketing methods to problems of public health and nutrition practices. Using experience in developing countries, the book includes the following: methods for tailoring health education to the perceptions of your target audience, techniques for finding "resistance points"; tools for designing effective messages; a discussion of special research approaches including focus groups; planning tips to encourage public and private cooperation; and case studies exploring the applications of social marketing principles.]".
IE&C-Shelf.
READ/ HLTH/ IEC/ ENG/ Social marketing/ INT/ BB2.
28. Piet-Pelon, Nancy (FPMT). FPMT Training Materials: Information, Education, Communication; 7 pp.
This paper was prepared as a preliminary document for designing a course or session on IEC in family planning management. It includes: a definition of the problems in developing an IEC strategy; the general objectives for a session or course; information on course design; and a list of materials that could serve as a resource. Trainers could use this to help in developing a course or session in IEC strategies as a component of family planning program management.
IEC-Management.
READ/ FP/ IEC/ IEC-1/ IEC-2/ IEC-3/ ENG/ Communication Strategies/ Communication Research/ INT/.
29. Puntos Basicos para Hablar en Publico (Basic Points for Speech Making): Ammerman Enterprises, Inc.; 1978; 7 pp.
Note: Trans. Olympia Vivas de Nunez, INCAE.
A quick guide to speaking in public dealing with everything from preparation to microphone technique.
IEC - speech making.
TOOL/ GEN/ IEC/ SPA/ speech making/ INT/.

30. Rogers, Everett M. Communication Strategies for Family Planning. New York: Free Press, Division of Macmillan Publishing Co., Inc.; 1973; 451 pp.
IEC-Shelf.
IEC/ FNG/.
31. Stycos, J. Mayone. The Clinic and Information Flow: Educating the Family Planning Client in Four Latin American Countries. Lexington, MA: Lexington Books; c1975; 1784 pp; ISBN 0-669-97717-9.
IEC-Shelf.
IEC/ ENG/ LAC/ INT/.
32. Stycos, J. Mayone. Clinics, Contraception, and Communication: Evaluation Studies of Family Planning Programs in Four Latin American Countries. New York: Appleton-Century-Crofts - Educational Division - Meredith Corporation; 1973; c1973; 207 pp.
Note: 2 copies.
IEC-Shelf.
IEC/ ENG/ LAC/ MEX/ COL/ HON/ DOR/ INT/.
33. Tagiuri, Renato. Sobre la 'Buena' Comunicacion (About "Good" Communication); 6 pp.
The article deals with identifying poor communication between people and fixing the situation.
HRM - communication.
TOOL/ GEN/ HRM/ IEC/ HRM - communication/ SPA/ INT/.
34. Watts, Harris. The Programme-Maker's Handbook (or Goodbye Totter TV). London, England: Needham Printers Ltd.; c1982; 230 pp; ISBN 0-9507582-1-3.
IEC-Shelf.
IEC/ ENG/.
35. Zimmerman, Margot L. and Gordon W. Perkin, M.D. Print Material for Nonreaders: Experiences in Family Planning and Health. Seattle, Washington: PIACT; 1982; 38 PP.
Note: PIACT Paper Eight.
IEC-Shelf.
ENG/ IEC/.

48. Crichton, Anne, Ph.D.; Dubncan Neuhauser, Ph.D. The New Epidemiology - A Challenge to Health Administration: Association of University Programs in Health Administration; c1982; 133 pp; ISBN 0-914904-84-1.

PLN-Shelf.

PLN/ ENG/.

49. Dann, William. Mission Statement; 24 pp.

This is a collection of data and materials that illustrate the components of strategic planning. Using an Alaskan health center as the organization, the collection includes: a mission statement with key objectives and five year plans and goals; a work plan for the first fiscal year of the plan; a charter for the health center; an organizational chart; financial data; and job descriptions and performance criteria for several key personnel. Trainers could use these to illustrate the tools used in the strategic planning process and could also use them to develop an exercise or project to have participants work on a strategic plan.

PLN-Strategic Planning.

TOOL/ HLTH/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/ Mission Statement and Objectives/ Goal Setting/ INT/.

50. Dann, William. Strategic Planning. Anchorage, Alaska; 34 pp.

This reading focuses on planning as a management tool. Divided into sections, the author discusses the following topics in some detail: The purposes of planning; the planning process; why planning fails; community needs assessment; priority setting methodologies; setting objectives; defining evaluation measures; and program steps and implementation strategies. Included is a sample questionnaire for priority setting. This could be used as a background reading for students. Trainers might try and develop an exercise based on this reading to have students practice writing goals, and objectives.

PLN-Strategic Planning.

READ/ TOOL/ HLTH/ PLN/ PLN-1/ PLN-2 PLN-3/ ENG/ Strategic Planning/ Mission Statement and Objectives/ Goal Setting/ Needs Assessment/ INT/.

51. de Bernard, Carmen, and David C. Korten. The Model Clinic. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1973; c1977: p183 - p202; 20 pp.

Note: This case in the ninth of twelve located in the Casebook For Family Planning Management.

In this case the executive director for the Fund for Family Planning Activities (FFPA), a private international family planning funding organization, must make a recommendation to the Board as to whether or not to fund a model clinic to serve as a training program. In the fictitious Latin American country two groups are invloved with providing family planning. The Ministry of Health is the primary channel for the delivery of family planning services, and the Veruguan Demographic Association (VDA)

is a private family planning organization. The activities of each organization are described, followed by a discussion of the need for training. The reader is asked to assume the role of the executive director of the FFPA and to try and weigh the options for an effective training program. The casebook introduces the topic of training with a description of the principles that should be applied in designing a training program. A study guide precedes the actual case, providing readers with a framework to consider the case and on which to base recommendations. The analysis thoroughly dissects the case raising important points that must be assessed when designing any training programs. Trainers could use this case to illustrate the need for carefully constructed training programs and as the basis for discussion on the various objectives served by training.

HRM-Shelf.

CASE/ FP/ HRM/ PLN/ TOT/ HRM-5/ TOT-2/ ENG/ SPA/ Program Planning/ In-service Training/ Staff development/ Teaching Methodologies/ LAC/ INT/.

52. De Jesus, Edilberto C. (Don Andres Professor of Business Management). Davao Del Sur POPCOM-PROCOM Outreach Program. Manila, Philippines: Asian Institute of Management; 1978; 27 pp. Note: This case is contained in the AIM Casebook.

A range of project management issues are the subject of this case on a population outreach program in the Philippines. The outreach program is described including a discussion of some of the barriers to program success. Trainers might be able to use this to provide an overview of some of the issues an outreach program manager might face and how they can be addressed.

PLN-Shelf.

CASE/ FP/ HRM/ PLN/ PLN-5/ ENG/ Program Planning/ Volunteers/ Organizational Design/ PHI/ INT/.

53. Dehasse, Jean-Georges. Notes De Cours - Atelier De Planification; March 23 - April 4, 1987; 31 pp.

Note: 2 copies.

This is a detailed outline of a workshop on operations planning that was given in Francophone Africa. The workshop contains an introduction and four modules. The modules cover the following topics: objective setting; activities and tasks; workplans; identifying gaps and finding solutions.

PLN-Program Cycle.

Course/ FP/ PLN/ PLN-4/ PLN-5/ FRE/ Program Cycle/ Program Planning/ Operations Planning/ Implementaion/ Objective Setting/ Workplans/ INT/.

54. Dehasse, Jean Georges (FPMT). Le cas du mandat du Ministere de l'Essor Familiale du Dorhan; 1 pp.

Exercise in setting objectives. The case describes the task of the Director of the family planning division to formulate objectives as a first step in the promotion of family planning among the population of the fictitious country, Dorhan. The exercise was developed for use in the Haiti planning workshop.

PLN-Goal Setting.

Exercise/ FP/ PLN/ PLN-3/ FRE/ Objective Setting/ Planning/ Haiti/ INT/.

55. Dehasse, Jean Georges (FPMT). Le voyage de Maurice Balladere; 1 pp.

Simple planning exercise. Requires student to identify the steps involved in planning a trip.

PLN-Program Cycle.

EXERCISE/ GNL/ PLN/ PLN-4/ FRE/ Planning/ INT/.

56. Delano, G.E., Eugene Weiss, O. A. Ladipo. Managing the Replication of a Pilot Project: Oyo State, Nigeria; November 18-21, 1985; 11 pp.

This paper discusses a pilot project undertaken in Nigeria which has as its objectives: "to explore new avenues of delivering health care to rural communities as well as to gain experience in promoting family planning in a rural setting." The paper opens with an overview of the project followed by highlights of the various aspects of project planning and implementation that contributed to its success. Due to its success, the project was replicated and the process of that replication is discussed in the report. At the conclusion of the report is a summary of the lessons learned in the project.

PLN-CBD Programs.

READ/ FP/ PLN/ PLN-6/ ENG/ CBD Programs/ Program Planning/ Integrated Programs/ Family Planning Programs/ NIR/ INT/.

57. Department of Health and Human Services. Patient Flow Analysis; September 1986; 26 pp.

This is a comprehensive manual on how to conduct a patient flow analysis for outpatient clinics. It contains detailed instructions on coding data collection and computerizing all the necessary forms. Each of the forms used in this system is also included in the manual.

PLN-Clinic Efficiency.

MAN/ HLTH/ PLN/ PLN- / Data Collection/ MIS/ Program Monitoring System/ CLinic Efficiency/ Patient Flow Analysis/ DOM/.

58. (CEDPA). Developing Plans and Budgets; 56 pp.

This was developed as a thirteen and a half hour comprehensive workshop to provide participants with an overview of the planning and budgeting processes. Specific units cover: management by objectives and results; workplans; steps in budget development; and, monitoring and controlling the implementation of plans and budgets. Included are: facilitator objectives; participant objectives; requirements; session handouts; training aids; notes on advance preparation; and suggested advance readings. This participation workshop was designed for use in Nepal, but is readily adaptable for use in other countries. The handouts could be useful for trainers preparing to teach any of the topics that are covered by this workshop.

PLN-Work Plan.

COURSE/ TOOL/ EXER/ GNL/ FIN/ PLN/ PLN-5/ FIN-1/ Budgeting/
Fiscal Techniques/ Program Planning/ Implementation/ Objective
Setting/ Workplans/ MBOR/ NEL/ INT/.

59. Direccion por Ob,etivos - Algunas Consideraciones de Procedimiento (Administration by Objective - Some Considerations About Procedure): INCAE, Distribution restricted.; 15 pp.

In outline form this article says that an employee will only be capable of self-direction to the extent that they understand and are committed to the objectives of the organization. Once this is achieved stabilization of objectives, direct action and evaluation complete the procedure (administration by objective).

PLN - strategic planning, HRM - administration by objective.
TOOL/ GEN/ HRM/ PLN/ SPA/ INT/.

60. Dufour, Patrice and Jacques Katuala. Planification et Management des Projets. Jacques Katuala and David Gould ed. Pittsburgh, Pennsylvania: University of Pittsburgh; 1983; 242 pp. (Seminaire Francophone en Management du Developpement; Module III).

This is the third module of a group of four designed to improve the skills of managers of development projects in Francophone Africa. Divided into six segments, this module focuses on project planning and management. The segments address the following: project planning and development; the project cycle; project preparation; the search and negotiation of financing; implementation; and evaluation. Each segment contains learning objectives, and a combination of simulations, cases, and exercises.

PLN-Shelf.

COURSE/ EXER/ CASE/ GNL/ FIN/ PLN/ PLN-3/ PLN-4/ PLN-5/ FRE/
Project development/ Implementation/ Program planning/ Program
evaluation/ Health care financing/ FFA/ CRB/ AFR/ INT/.

61. Edencia, Donato C. Manuel on Developing and Screening Population / Family Planning Projects. Metro Manila; October 1983; 68 pp.

"This manual is intended to serve as a simplified and practical reference on project formulation and screening. [Containing] four chapters, the manual discusses the basic concepts of project development and provides a detailed description of the structure of a "typical" project. The [remaining] chapters contain practical guidelines in preparing the project lead, the concept paper and the full proposal." While written for use by the Commission on Population in the Phillipines, the step by step format of this manual is readily adaptable to other settings.

PLN-Shelf.

Manual/ FP/ PLN/ PLN-4/ PLN-5/ Operations Planning/ Proposal Writing/ Project Development/ Objective Setting/ Needs Assessment/ Implementation/PHI/ INT/.

62. Edmands, Elizabeth M. Concepts and Issues in Family Palnning: Guidelines for Nurses, Midwives, and Other Health Personnel: Focus on Africa and the Middle East. 2 ed.: Program for International Training in Health; 1984; 169 pp.

PLN-Shelf.

PLN/ ENG/ AFR/ INT/.

63. Edmunds, Marilyn and Deirdre Strachan and Sylvia Vriesendorp. Implementing Client-Responsive Family Planning Programs: A Manual for Service Personnel/ O Planejamento Familiar Sensivel: Um Manual Para A Equipe Multiprofissional De Saude/ Clientes Satisfechos en Planificacion Familiar: Una Guia Para Mejorar Los Servicios/ La parole a l'usager: Guide pratique pour les services de planification familiale. Chestnut Hill, Massachusetts: Pathfinder; 1987; 89 pp.

Note: 4 copies: 1 English, 1 French, 1 Spanish, 1 Portugeuse.

Written for family planning program managers and project directors, this handbook explores the relationship between family planning program elements and client satisfaction. The handbook contains three sections. Section I describes five key program elements that contribute to client satisfaction. Section II focuses on management areas and provides suggestions as to the tools and techniques that can be used to alter programs to make them more responsive to client needs. The third section includes seven appendices, containing sample forms and questions, suggested resource materials, and a mini-case, which all help to augment the other sections.

PLN-Shelf.

MAN/ FP/ PLN/ PLN-6/ ENG/ FRE/ SPA/ POR/ User Perspective/ Demand for Contraceptives/ Access/ Availability/ Needs Assessment/ Family Planning Programs/ Demographic Factors/ BB/ INT/.

64. El Concepto de Estrategia de la Empresa (The Concept of Business Strategy); 14 pp.

An introduction to business strategy. The article defines business strategy, gives its advantages and some of its limitations and gives means to test the viability of strategies.

PLN - strategy.

TOOL/ GEN/ PLN/ SPA/ INT/.

65. Elkamel, Farag, Ph.D. Developing Communication Strategies and Programs: A Systematic Approach. Cairo, Egypt: UNICEF and The Centre for Development Communication (CDC); 1986; 98 pp.

Note: 1 ENG and photocopy of FRE draft.

"The objective of this clearly written handbook is to improve the effectiveness of development programs through appropriate use of communication and social marketing strategies and techniques. The book is intended to respond to the following specific needs in developing effective communication programs. First, it should serve as a guide to plan and implement such programs. Secondly, it can be used as an evaluation and monitoring tool. Third, it can be used as a text for training workshops designed to improve communication skills, particularly with relevance to public health issues." The book includes a number of training tools and instruments. Among those included are: a managers check list to help assess program progress which is located at the end of each chapter; exercises; sample questionnaires; sample proposal requests; and an appendix on media selection and mix. The handbook concludes with a selected bibliography. NB: This handbook is the basis of an audio-visual package that should be available soon from UNICEF.

IEC-Shelf.

MANUAL/ TOOL/ EXER/ READ/ HLTH/ IEC/ IEC-1/ IEC-2/ IEC-3/ M&E/ PLN/ ENG/ FRE/ Social Marketing/ Media Choice/ Communication/ Communication Strategies/ Health Education/ Program Evaluation/ Marketing/ Competitive Strategy/ Market Research/ BB/ INT/.

66. Emrey, Robert and Diane Wilson-Scott, Micheal H. Bernhart, Camille E. Fallow. New Methods for Assessing Developing Country Health Services Management Needs; July 1979; Vol. I-74 / Vol. II-145 pp.

"The purpose of this report is to begin to identify appropriate and inappropriate methods of assessing health program management." Volume I contains a "selective survey of studies from three perspectives on managerial effectiveness in delivering health services in developing countries." Volume II is the appendix and it contains: abstracts of Managerial Assessments; an Inventory of Health Services Managerial Assessment Resources; and, a Bibliography.

PLN-Needs Assessment.

READ/ HLTH/ PLN/ PLN-4/ ENG/ Needs Assessment/ Operations Research/ INT/.

67. Estableciendo Objetivos Corporativos (Establishing Corporate Objectives); 3 pp.

Simple objectives for a growing company or organization.

PLN.

TOOL/ GEN/ PLN/ SPA/ INT.

68. Estableciendo una Mision Corporative (Establishing a Corporate Mission); 2 pp.

Defining the corporate mission as the first step in strategic planning.

PLN-Strategic planning.

TOOL/ GEN/ PLN/ SPA/ Strategic Planning/ INT.

69. Estrategia Informal y Formal (Informal and Formal Strategy; 17 pp.

An introduction to formal (structured) strategic planning. Gives seven explicit steps to the process. Outlines why formal strategy is superior and some of its drawbacks.

PLN - Strategic Planning.

TOOL/ GEN/ PLN/ SPA/ INT/ Strategic Planning/.

70. Estrategias Competitivas Genericas (Generic Competitive Strategies). Mexico: Compania Editorial Continental; 1982; 12 pp. (Competitive Strategies).

The article gives three basic business strategies, expense leadership, differentiation and focus, their advantages and liabilities.

PLN - competitive strategies, strategic planning.

TOOL/ GEN/ PLN/ SPA/ INT/.

71. Family Planning International Assistance. FPIA: 1984-1986 A Strategic Plan (Final Report). New York, NY: Family Planning International Assitance; 1987; 68 pp.

This comprehensive report on FPIA's Strategic Plan was prepared for three reasons: 1) to consolidate ongoing monitoring of planned versus actual performance; 2) to update the strategic plan and describe changes; and 3) to share information. The report includes specific information on the objectives stated in the original strategic plan and describes the progress to date.

In addition, each of the 37 countries that FPIA operates programs in has a section devoted to the plan progress in that country.

This report can serve as an example of the multiple uses of a strategic plan and to illustrate how objectives might be stated.

STR/PLN-Shelf.

READ/ FP/ PLN/ PLN-1/ PLN-2/ PLN-3/ ENG/ Strategic planning/ Goal setting/INT.

72. (Alan Guttmacher Institute). Family Planning Perspectives; 1986-.

Published bimonthly by the Alan Guttmacher Institute, this journal contains articles and special reports on domestic family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

73. Faruquee, Rashid. Integrating Family Planning with Health Services - Does it Help? 2 ed. Washington, D.C.: The World Bank; January 1985; 44 pp. (World Bank Staff Working Papers; Number 515).

Reports on an extended study conducted in the Narangwal district of India. This paper responds to the question posed by the study as to "whether the integration of health and family planning services helps in attaining family planning and health objectives." The project is described in detail, followed by a discussion on each of the variables examined and the findings.

PLN-Integrated Program.

READ/ FP/ PLN/ PLN-6/ ENG/ Program planning/ Integrated programs/ Family planning programs/ MCH programs/ INI/ INT.

74. Fisher, Andrew; John Laing and John Stoeckel. Handbook for Family Planning Operations Research Design / Manuel de recherche operationelle en matiere de planification familiale. New York: Population Council; 1983; 64 pp.

Note: 3 copies: 2 French, 1 English photocopy.

"This handbook was written to serve as a basic text for operations research projects. It is designed to assist readers in the development of a complete family planning research proposal," and takes the reader systematically through each step of the process. Containing fourteen chapters, the handbook begins with problem identification and includes chapters on the following: Justification for Selecting the Research Problem; Objectives and Hypotheses; Operational Definitions; Study Design; Sampling; Data Collection; Tabulation and Analysis of Data; Reporting Research Findings; Limitations of The Study; Study Work Schedule; Appendices; and the Title page and Abstract. In addition to the handbook's utility as a text, it can also serve family planning managers as a reference when preparing a research proposal.

PLN-Shelf.

MAN/ FP/ PLN/ PLN-6/ ENG/ FRE/ SPA/ Operations Research/ Proposal Writing/ Problem Identification/ BB/ INT/.

75. Five Positions on Needs Assessment. Davis, L. N.; 1974; 1 pp. This one page hand-out lists the five positions on needs assessment as: authoritarian; democratic; laissez-faire; moderate-authoritarian; and, moderate-laissez faire.

PLN-Needs Assessment.

TOOL/ GNL/ PLN/ PLN-4/ ENG/ Needs Assessment/ INT/.

76. Force - Field Analysis 2. (pp).

This is a two page description of the force field analysis technique. A four step process is outlined, followed by the advantages of using this technique. Trainers could use this as a handout or as the basis for an exercise on problem solving techniques.

PLN-Strategic Planning.

EXER/ TOOL/ GNL/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/
Problem Solving/ INT/.

77. Formulacion del Programa de Estrategias (Formulation of Strategic Programs). Mexico: Compania Editorial Continental; 1985; 21 pp. (Strategic Planning).

The identification and evaluation of strategic programs as a means of realizing long term plans.

PLN - strategic planning.

TOOL/ GEN/ PLN/ SPA/ strategic planning/ INT/.

78. FPMT. Needs Assessment: The Assessment Instruments and The Assessment Report; 32 pp.

These are instruments designed to aid in conducting a family planning needs assessment and preparing the assessment report. The first section contains five instruments which detail how to obtain the necessary information. These instruments are: country profile; the family planning organization; the assessment of individual training needs; the training institute; and existing training activities. The second section divides the report into eight parts: the executive summary; description of the assessment; country profile; the family planning organization; training institutions; existing training activities; strategies for training and technical assistance; and, proposed FPMT activities.

PLN-Needs Assessment.

TOOL/ READ/ FP/ PLN/ PLN-4/ ENG/ SPA/ Needs Assessment/ Program Planning/ INT/.

79. Fray, Lionel L. How To Develop A Strategic Plan. Roy A. Lindberg. New York, New York: American Management Association, Extension Institute; 1987; 180 pp.

This is a comprehensive course designed for managers or students who want a self-paced individualized study. Chapters include: The Nature of Planning; A Planning Guide; Planning and Organization; Corporate Planning; Business Unit Planning; Information and Planning; and Developing The Plan. The course consists of text material and four activities to be completed by the reader. These include: instructional programming; an examination; a practice case; and a case that serves as a final examination. This course is oriented towards business and corporate use, but does contain information that is transferrable to a health setting.

STR/PLN-Shelf.

COURSE/ CASE/ EXER/ GNL/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/ Situational Analysis/ Goal Setting/ Objective Setting/

Budgeting/ Mission Statement and Objectives/ Competitive Strategy/ DOM/.

80. The Futures Group. Latin America-Caribbean Regional CSM Conference. Washington, D.C.: The Futures Group; January 1986; 4 sessions.

STR/PLN-Shelf.

PLN/ Strategic Planning/ ENG/.

81. Gallen, Moira E., M.A. and Ward Rinehart, M.A. Operations Research: Lessons for Policy and Programs. Population Reports ed. Baltimore, Maryland; May-June 1986; 38 pp.

"This issue of "Population Reports" discusses ... the findings of about 140 recent USAID and WHO - supported projects in about 50 developing countries that are considered operations research... Operations Research has gradually evolved from a strong policy-oriented technique to a more program oriented approach... Emphasis now is more on practical ways to develop better management of FP and health services..." The major topics covered by the paper are: delivery systems; method choice; community workers; training and supervision; IE and C; Integration of service delivery; community participation; fees and financing; cost-effectiveness of programs; and application of operations research findings. Throughout the text are blocks of highlighted information on the more technical aspects of operations research: how it is conducted; putting the findings into practice; and new directions. A table that allows for some comparison of completed operations research projects between 1974-1986, concludes the paper. Trainers could use this as a background reading on operations research or on any of the specific topics listed above. The text is illustrated with examples drawn from many countries and projects around the world.

PLN-Operations Research.

READ/ TOOL/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ IEC/ Health Care Financing/ Fee For Services/ Operations Research/ Cost Effectiveness Analysis/ Integrated Programs/ Contraceptive Methods/ Community Health Workers/ Problem Identification/ Program Planning/ Implementation/ Service Delivery Systems/ INT/.

82. Garrucho, Peter D. Asian Social Health Institute Family Center. Manila, Philippines: Asian Institute of Management; 1972; 27 pp.

Note: This case is contained in the AIM Casebook.

This case examines the activities of the Family Center, a community service department formed by the Asian Social Institute in the Philippines. The Family Center operates twenty-five family planning clinics, and "a family life education program which assists families in their religious, social and economic needs through lectures and counseling services." With pressures to increase acceptors exerted through the Population Commission which funds the center's clinic activities, "the officers of the center are reviewing their policies and performance to determine the direction of the center's future activities. The case is

supplemented by exhibits that include information on the following: the objective and ideology of the Asian Social Institute; moral aspects of Planned Parenthood; data on the clinical program; statistics; and a budget for the institute. PLN-Shelf.

CASE/ FP/ PLN/ PLN-4/ PLN-5/ ENG/ Religious Groups/ Program Planning/ Family Planning Programs/ FHI/ INT/.

83. Garrucho, Peter D. Commission On Population: A Total Development Strategy For The Philippine Population Program. Manila, Philippines: Asian Institute of Management; 1975; 17 pp.

Note: This case is contained in the AIM Casebook.

The case focuses on a proposed plan to decentralize the Philippine Population Program and simultaneously integrate the program with development activities at the regional and local levels. The case reviews the major issues posed by this plan. They include: the planning and budgeting process; the organizational system; the role of key personnel; support of local political leadership; training; the management structure; and, monitoring and evaluation. Trainers could use this case as the basis for a classroom discussion or an exercise where participants were required to develop a plan to address the issues raised by the case. Although this case is set in the Philippines, the problems suggested by the case might appear anywhere where such a strategy was being considered.

PLN-Shelf.

CASE/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Community Participation/ Local Government/ Socio-economic Development/ Integrated Programs/ Budgeting/ Program Planning/ Implementation/ Decentralization/ PPI/ INT/.

84. Garrucho, Peter D. Population Center Foundation Commercial Contraceptive Marketing Program (A and B). Manila, Philippines: Asian Institute of Management; 1975; 27 pp.

Note: This case is contained in the AIM Casebook.

The subject of this two part case is a commercial contraceptive marketing program (CCMP) in the Philippines. In Part A, the program head has set short term objectives for the program and is reviewing his strategy to determine if he has incorporated sufficient activities to meet them. A description of the activities for each program component provides the reader with information to use in examining Part A. In Part B, The Condom Distribution Project has been selected as a component of the CCMP and options for implementing this project are considered. The Program head has just concluded initial negotiations with a large retail distributor and is considering his alternatives.

Information is given on: the goal of the project; the distributors approached by the project head; and the criteria for negotiations between the distributors and the program head. Also included is a description of an earlier experimental project. Supplementing the case are exhibits on the following: the history of family planning in the Philippines; a comparison of the Commission on Population and the Population Center Foundation; a

flow chart for contraceptive distribution; a budget; estimated data on retail outlets in Manila; and a table of price structures. Trainers could use this two part case sequentially when giving a session on retail contraceptive marketing schemes. NB: The AIM Casebook contains another case on this topic called, "The Condom Distribution Project".

PLN-Shelf.

CASE/ FP/ PLN/ PLN-3/ PLN-4/ PLN-5/ PLN-6/ ENG/ Commercial Retail Sales/Marketing/ Competitive Strategy/ Condom/ Program Planning/ PHI/ INT/.

85. Goldsmith, Arthur, Barbara Pillsbury, and David Nicholas. Community Organization; May 1985; Issues Paper 3; 72 pp. This paper was prepared to help policy makers, program managers, and researchers identify problems in community organization that can be addressed by operations research. The paper is divided into three major chapters. They cover the following: the definition of community organization for primary health care and its importance in operations research; operational problems related to community organization; and, designing an operations research study on community organization.

PLN-Operations Research.

READ/ HLTH/ POL/ PLN/ PLN-5/ ENG/ Community Participation/ Operations Research/ INT/.

86. Gonzales, Maribel. Population Estimates and Projections. Boston, MA: Harvard School of Public Health; 1980; 25 pp. This paper discusses the need for population estimates and discusses the methods used to develop them. Attached is a set of problems that require the use of arithmetic and geometric rates of increase and arithmetic and geometric interpolation. The reader is then asked to take results of these calculations and compare them, taking into account additional factors. The solutions are provided for the problem sets. NB: This is also located in PLN-Goal Setting.

POL- Population dynamics.

Read/ Exer/ FP/ POL/ POL-1/ PLN/ PLN-3/ Eng/ Population dynamics/ Population growth/ Target setting/ Goal setting/ Demographic factors/ INT.

87. Gorosh, Martin, Donald Lauro, and Susan Nalder. Disseminating Operations Research Findings Through Training. New York: Center for Population and Family Health; November 1984; Working Paper 11; 16 pp.

This paper describes the relationship among the training, service and research activities of the Center for Population and Family Health at Columbia University. Specifically, they have used training workshops "to communicate Operations Research findings and stimulate new projects." Included is a discussion of Columbia's Program followed by a description of the workshops that were conducted. "The content of the workshop covered four basic areas: 1. Approaches to the assessment of community needs and resources; 2. Selection of program design; 3. Review of

specific problems and interventions; and, 4. Management, research and evaluation issues--approaches and methodologies.".

PLN-Operations Research.

READ/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Operations Research/
INT/.

88. Gorosh, Martin, Dr. P.H., and William Van Wie, Dr. P.H. Checklist for Program Planning: Center for Population and Family Health; October 1984; 10 pp.

"This planning instrument can be used in developing a new program, adapting an existing program, or as a guide for evaluating the planning process in an on going program... The main function of this checklist is to identify particular planning approaches to service delivery in major project components." The checklist is divided into the following sections: types of information needed; sources of information; examples of types and sources of information; baseline information; problem definition; priorities; objectives; obstacles and limitations; development of the written plan; plan review; and, a plan for planning. Trainers could provide participants with this as a resource, or use it for preparing a session on program planning.

PLN-Needs Assessment.

TOOL/ HLTH/ PLN/ PLN-4/ PLN-5/ ENG/ Project Development/ Problem Identification/ Program Planning/ Needs Assessment/ Objectives Setting/ Implementation/ INT/.

89. Graves, J.C., Sheila Walsh McDonald, and Bonnie L. Bullock. Computer Simulations and WIC Clinics. Washington, D.C.; November 19, 1985; 13 pp.

The paper documents the application of a computerized Patient Flow Analysis system to a WIC clinic in Utah. The Problems identified by the clinic are presented, followed by a description of the changes implemented to solve some of these problems. The paper illustrates the utility and benefits of a PFA system.

PLN-Clinic Efficiency.

READ/ HLTH/ PLN/ PLN-6/ ENG/ Clinic Efficiency/ Patient Flow Analysis/ DOM/.

90. Graves, J. L., and Barbara Waggoner. The Use of Computer Simulation Programming in Improving the Design of Family Planning Clinics; November 19, 1985; 14 pp.

This paper describes a computerized Patient Flow Analysis System for evaluating efficiency in family planning clinics.

PLN-Clinic Efficiency.

READ/ FP/ PLN/ PLN-6/ ENG/ Clinic Efficiency/ Patient Flow Analysis/ DOM/.

91. Handout; 1 pp.

This one page handout is labeled as "a dialectical model of needs assessment and community education".

PLN- Needs Assessment.

TOOL/ GNL/ PLN/ PLN-4/ ENG/ Needs Assessment/ INT/.

92. Hatcher M.D., Robert A. Contraceptive Technology: International Edition. Atlanta, Georgia: Printed Matter, Inc.; 1989; 460 pp.

"This international edition of "Contraceptive Technology" provides contraceptive and reproductive health information that is timely, thorough, intellectually honest and practical. It is intended as a reference for the providers of family planning information and services... [The book] examines the benefits and practices of family planning around the world. The book is divided into sections that explore the status of family planning in international societies, update the management of sexually transmitted diseases including human immunodeficiency virus (AIDS), describe the selection and administration of the contraceptive methods, and offer guidelines for managing family planning services." It is an essential resource for anyone involved in the management and delivery of family planning services.

Shelf-Ref.

READ/ FP/ HRM/ PLN/ IE&C/ ENG/ Family Planning/ AIDS/ Maternal & child health/ Infant mortality/ Child mortality/ Maternal mortality/ Women's rights/ Service delivery systems/ Clinic based delivery systems/ CBD programs/ Family planning programs/ Integrated programs/ Vertical family planning programs/ Contraceptive supplies/ Condom/ IUD/ Implants/ Injectables/ Oral contraceptives/ Spermicides/ Contraceptive technology/ NFP/ Health benefits of family planning/ Infertility/ STD/ Child survival/ Nutrition/ Family planning personnel/ FP counselors/ FP instructors/ Physicians/ Nurses/ Nurse midwives/ INT/ BB2.

93. Hatcher, Robert A. M.D.; Felicia Guest, Felicia Stewart, Gary Stewart and others. Contraceptive Technology 1986-1987. New York, NY: Irvington Publishers, INC; c1986; 310 pp; ISBN 0-8290-1762-3. Note: 13th Revised Edition.

PLN-Shelf.

PLN/ ENG/ INT/.

94. Henderson, Joyce R. A Five-Year Plan to Provide Family Planning Services to Low-Incomew Families of Los Angeles County. L.A., CA: Los Angeles Regional Family Planning Council, INC; October 1981; 83 pp.

STR/PLN-Shelf.

PLN/ ENG/ Strategic Planning/ DOM/.

95. Heskett, James L. Managing in the Service Economy. Boston, MA: Harvard Business School Press; 1986; 211 pp; ISBN 0-87584-130-9.

STR/PLN-Shelf.

PLN/ Strategic Planning/ ENG/.

96. Hsiao, William C., Ph.D. (Harvard School of Public Health). Special Report: Transformation of Health Care in China. The New England Journal of Medicine; April 5, 1984.

"This article examines the evolving Chinese cooperative medical system" and discusses the relationship between economic structure and health care. The article includes discussions on the Chinese health system, recent economic reforms, the impact of economic reform on rural health system. The concluding section is on the lessons learned from this experience. This article documents a transition from an integrated program to a more vertical delivery system.

PLN-Integrated programs.

READ/ FP/ PLN/ PLN-6/ ENG/ Integrated programs/ Vertical family planning programs/ Family planning programs/ Service delivery systems/ PRC/ INT.

97. Hulett, Daniel G. and Jean Renjilian. Strategic Planning Demystified. Scott W. Sherwood. Organization Development: Present Practice and Future Needs; 1982. Washington, D.C.: American Society for Training and Development; 1983: 35-49; 15 pp.

This chapter outlines a model for strategic planning that is applicable to both profit-making and not-for-profit organizations. Using a team approach to plan, the chapter begins by defining strategic planning, and discusses some of the elements that must be factored into a strategic plan. Mission statements are discussed in detail, followed by goal setting and evaluation. The chapter includes three diagrams that could be useful to trainers. The first is of a strategic planning model, the second diagram is an overview of the strategic planning process, and the third delineates internal and external forces. While the emphasis is directed towards the profit sector, the chapter contains information that could be used by trainers to describe strategic planning for the non profit sector. Note: This chapter is taken from a book of conference proceedings entitled, "Organization Development: Present Practice and Future Needs."

PLN-Strategic Planning.

READ/ TOOL/ GNL/ PLN/ PLN-1/ ENG/ Mission Statement and Objectives/ Strategic Planning/ Goal Setting/ INT/.

98. Hussenot, Philippe. La Gestion Publique par Objectifs. 5 rue Rousselet, 75007, Paris, France: Les Editions d'Organisation; 1983; 249 pp; ISBN 2-7081-0571-X.

Lengthy and fairly theoretical expose on public administration and the use of PPBS and MBOR systems. Includes cases and examples drawn from the Ministere de l'Education Nationale. Has some examples and worksheets that could possibly be adapted by the really dedicated trainer who has plenty of time.

PLN-Shelf.

READ/ PLN/ PLN-5/ FRE/ MBOR/ PPBS/ Objective Setting/ Workplans/ Implementation/ FRA/ DOM/.

99. Ickis, John. El Seguro Social de Cartagua (Cartagua's Social Security): INCAE, reproduction prohibited.; 1973; 24 pp.

The newly appointed head of the family planning section of the social security system in a pseudonymous Central American country attempts to improve the program.

PLN -.

CASE/ FP/ HRM/ PLN/ SPA/ INT/.

100. Ickis, John (INCAE). The Strategic Management of Family Planning Organizations: An Analytic Approach. Boston, Massachusetts: Family Planning Management Training Project; March, 1987; FPMT Consultants' Workshop; 8 pp.

Note: This is a series of Overheads.

This is a series of 8 overheads comprising the outline for a lecture on using the case method. It was prepared for FPMT's training of trainers workshop for consultants.

PLN-Strategic Planning.

TOOL/ FP/ PLN/ ENG/ Strategic planning/ INT.

101. Ickis, John C.; Edilberto de Jesus and Rushikesh Maru. Beyond Bureaucracy - Strategic Management of Social Development. West Hartford, Connecticut: Kumarian Press; 1986; 256 pp.

"This work advances new concepts of social development management such as strategic management, empowerment and environmental analysis." Using examples from projects around the world, the contributors "examine the problems and opportunities in the application of these concepts to achieving the goals of social development programs in ways that will [advance] poor communities." The range of opinions expressed in this book make it very useful as a background reading for sessions on managing the policy environment and strategic planning.

STR/PLN-Shelf.

READ/ GNL/ PLN/ POL/ PLN-2/ POL-3/ ENG/ Policy Objectives/ Policy Environment/ Socio-economic Factors/ Strategic Planning/ INT/.

102. Ickis, John C. CBD Management Training Project: Needs Assessment; 20 pp.

The objective of the project that this instrument was designed for is, "to improve the management of CBD programs in Latin America by strengthening institutional capacities to provide appropriate technical assistance and training." The document serves both as a component of a report on this specific project, and as an example of how this sort of assessment can be conducted.

PLN-Needs Assessment.

TOOL/ READ/ PLN/ PLN-6/ ENG/ Needs Assessment/ CBD Programs/ Training Needs/ LAA/ INT/.

103. Ickis, John C. (INCAE). Community Distribution Reports (A and B). Alajuela, Costa Rica; 1986; A-9, B-12 pp.

In these complementary cases, the focus is on the use of data to evaluate a community based distribution program in Latin America. The project supervisor is "responsible for analyzing the plans and reports submitted by the five community workers who report to her, identifying problems in achieving goals and objectives, and taking the remedial actions she deemed necessary." In Case A the supervisor receives a report from one of the community workers that includes seven tables that summarize the data collected by the worker. Trainers could develop a role play with a dialogue between the supervisor and the community worker on the content of the report and the reporting system. In Case B, the project supervisor wants to use the reports of the evaluation section to determine the successes and problems in the provinces she is responsible for, and to try and assess the relationship between promotional activities and contraceptive sales. The tables and reports prepared by the community worker and the evaluation section, are provided for analysis. Trainers could use this to discuss supervision issues in CBD projects and data collection, including the type of data collected, how it is recorded and reported, and its utility in project evaluation. Participants could be asked to prepare a written analysis of the data contained in Case B or to participate in a classroom discussion.

MIS-CBD Records.

CASE/ FP/ PLN/ HRM/ MIS/ HRM-9/ MIS-6/ MIS-2/ ENG/ Supervision/ Logistics/CBD Programs/ Program Monitoring Systems/ Implementation/ Objective Setting/ LAA/ INT/.

104. Ickis, John C. Fijacion de Metas en La Trinidad (Stabilization of Goals in Trinidad); 5 pp.

A supervisor of family planning clinics struggles with a means to stabilize the goals for his clinics.

PLN.

CASE/ GEN/ FP/ SPA/ INT/ PLN/.

105. Ickis, John C. Goal Setting In "La Trinidad" / (Target-Setting In La Trinidad). Korten, Francis F. and David C. Korten. Casebook For Family Planning. USA: The Pathfinder Fund; 1974; c1977: p91 - p104; 14 pp.

Note: This case is the fourth of twelve located in the Casebook for Family Planning Management.

This case "focuses on the uses of targets within a national family planning program in Latin America. The author describes a target setting procedure and the difficulties experienced by a regional supervisor in implementing the procedure." The supervisor approaches the overall program director with his concerns and is asked to work out a set of specific recommendations about the target setting system in this situation and to consider how changes might be implemented. The case is introduced with a study guide providing readers with a framework to review the case. Following the case, a thorough analysis of the case elements is presented which discusses the potential and the actual use of targets. NB - this casebook includes another case that focuses on aspects of target setting, entitled, "The Overcrowded Clinic".

HRM-Shelf.

CASE/ FP/ PLN/ PLN-3/ ENG/ SPA/ Target Setting/ LAC/ INT/.

106. Ickis, John C. A Proposal for Dr. Teran. Boston, MA: FPMT; 1987; 9 pp.

This case focuses on the dilemmas confronting the director of a family planning association in Latin America. A consultant has been hired to review the association's CBD program and his recommendations for improving the program are presented in the case. The director must determine how to respond to the recommendations, which include a pilot project to train the community based workers and supervisors. Accompanying the narrative section are the following exhibits: current statistics of the CBD program; monthly operating budget of the CBD program; description of the pilot training project; and, suggestions for other ways to improve the program. This case could be used as the basis for classroom discussions or a written analysis.

PLN-CBD Programs.

CASE/ FP/ PLN/ PLN-6/ CBD Programs/ Target Setting/ Goal Setting/ Training Programs/ Training Needs/ Budgeting/ LAA/ INT/.

107. Ickis, John C. The Strategic Management of Family Planning Organization: An Analytic Appr [Transparencies]. INCAE, Costa Rica, Nicaragua; March 18, 1987; 8 Transparencies.

8 Transparencies - lecture outline. Prepared for FPMT's TOT on using the.

PLN - Strategic planning.

LECTURE OUTLINE/ FP/ PLN/ ENG/ STRATEGIC PLANNING/ INT.

108. ICOMP. Participatory Communication for Health. Kalutara, Sri Lanka: ICOMP; October 1985; 28 pp.
PLN-Shelf.
PLN/ ENG/.

109. La Informacion para la Alta Direccion, Previa a una Estrategia (Information for Upper-level Management, before Strategy); 13 pp.
The article emphasizes the necessity of policy makers having accurate information prior to the formation of strategy and helps to determine the necessary information.
PLN - strategic planning.
TOOL/ GEN/ PLN/ SPA/ strategic planning/ SPA/ INT/.

110. Integration of Service Delivery. Population Reports; Series J-31 (Operations Research: Lessons for Policy and Programs). Taken from a Population Report on Operations Research, this section discusses various findings about the integration of family planning with delivery of other services. Using examples from a number of projects, different techniques for introducing program components are presented, as are several combinations of interventions. This could serve as a background reading for a session on integrated programs and/or program planning.
PLN-Integrated Programs.
READ/ FP/ PLN/ PLN-6/ ENG/ Integrated programs/ Service delivery systems/ Program planning/ INT.

111. International Centre for Diarrhoeal Disease Research. The Matlab Project: Lessons for Policy. Bangladesh: International Centre for Diarrhoeal Disease Research; December 1987; 4 pp. (MCH-FP Extension Project Briefing Paper; no.1).
The Matlab Project is a family planning project that was initiated in Bangladesh in 1982. This paper reviews the history of the project and details the lessons that can be learned from this experience. Also included as a section on the elements of a successful program.
PLN-Program Cycle.
READ/ FP/ PLN/ PLN-5/ ENG/ Project development/ Implementation/ INT/ BAN.

112. International Planned Parenthood Federation. Community Family Planning Services in IPPF / Les services Communautaires de Planification Familiale de L'IPPF / Servicios de Planificacion Familiar Comunitarios en IPPF. London, England: IPPF; December 1981; 24 pp.
Note: 3 copies: 1 English, 1 Spanish, 1 French.
PLN-Shelf.
CBD Program/ PLN/ ENG/ SPA/ FRE/ INT/.

113. International Planned Parenthood Federation. Community Participation in Family Planning: Issues and Examples / La Participation Communautaire a la Planification Familiale: Description et Exemples / La Participacion Comunitaria en la Planificaiion Familiar: Problemas y Ejemplos. London, England: IPPF; July 1982; 42 pp.

Note: 3 copies; 1 English, 1 French, 1 Spanish.

POL-Shelf.

POL/ PLN/ Community Participation/ ENG/ FRE/ SPA/ INT/.

114. International Planned Parenthood Federation. The Community Participation Approach in Family Planning Programmes: some suggestions for development / La Participation Communautair dals les Programmes de Planification Familiale: Quelques suggestions pour la realisation des programmes / El enfoque de la participacion comunitaria en los programas de polanification familiar: Algunas sugerencias para el desarrollo de proyectos. London: IPPF; 1986; 39 pp.

PLN-Shelf.

PLN/ FRE/ SPA/ ENG/ INT/.

115. International Planned Parenthood Federation. Community Participation in Family Planning: Case Studies form Bangladesh. London: IPPF; 1987; 46 pp.

PLN-Shelf.

PLN/ ENG/ INT/.

116. International Planned Parenthood Federation. Family Planning Handbook for Doctors. edited by Ronald L. Kleinman ed. London, England: International Planned Parenthood Federation; 1980; 243 pp; ISBN 0-86089-040-6.

Note: IPPF Medical Publications.

PLN-Shelf.

PLN/ ENG/.

117. International Planned Parenthood Federation. Integrated Programs in IPPF / Programmes Integres au Sein de l'IPPF / Los Programmas Integrados de Planificacion Familiar. London, England: IPPF; August 1981; 28 pp.

Note: 3 copies; 1 English, 1 French, 1 Spanish.

PLN-Shelf.

PLN/ Integrated Programs/ ENG/ FRE/ SPA/ INT/.

118. International Planned Parenthood Federation. Planned Parenthood and Women's Development - Lessons From The Field. London: Typographic Press Limited; 1982.

This book discusses many aspects of the projects that the Planned Parenthood and Women's Programme has undertaken. "The book is in two parts. The first part presents nine case studies of PPWD projects and describes, in question and answer form, how each project came about, what it did and what it has acheived... The second section discusses what lessons have been learned from the programme as a whole, particularly focusing on the problems which

the projects encountered and how these were overcome." Specific issues addressed in this section are: environment; needs identification; strategies; participants; partners; family planning; costs and finding mechanisms; problems and constraints; and, assessment and monitoring. The case studies are from the following countries: Costa Rica; Jamaica; Egypt; Indonesia; Bangladesh; Kenya; Lesotho; Sri Lanka; Tunisia. Trainers could use the cases presented in the book to illustrate how family planning projects can be integrated with other development goals.

PLN-Program Cycle.
CASE/ READ/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Policy Environment/ Women's Programs/ Integrated Programs/ Project Development/ Family Planning Programs/ Program Planning/ Needs Assessment/ Problem Indicators/COS/ JAC/ EGY/ IND/ BAN/ KEN/ LES/ SRL/ TUN/ INT/.

119. Intrah. Needs Assessment Checklist. Durham, North Carolina; 7 pp.

This instrument focuses specifically on assessing the training needs for family planning within a country. Divided into seven sections, it addresses: Policy Status of Family Planning; Extent of Family Planning Services; Training; Organizational Strengths; Donors; In-Country Resources; and Recommendations. Trainers might find this to be a useful tool when designing a training program.

PLN-Needs Assessment.

TOOL/ FP/ PLN/ TOT/ PLN-4/ ENG/ Needs Assessment/ Family Planning Programs/ Training Needs/ INT/.

120. Jacome, Edgar S. The Supervision of Lidia. Boston, MA: FPMT; 1987; 6 pp.

In this case, a promoter working for a CBD program in a Latin American country struggles with the barriers that affect her ability to perform her job effectively. A consultant, assigned to "identify the unique features of successful CBD programs" for his own organization, observes the promoter as part of his research. The issues raised include: supervision and support of CBD personnel; communications; flexibility of protocols and policies; user demand and perspective; and, incentives and disincentives. The case can be dissected taking the perspective of the program director, the consultant, or the promoter, and could even be adapted to be a role play exercise to illustrate the complex issues faced at the different levels of service delivery.

PLN-CBD Programs.

CASE/ FP/ HRM/ HRM-9/ PLN/ PLN-6/ ENG/ CBD Programs/ Operations Planning/ Supervision/ Program Planning/ Service Delivery Systems/ Interpersonal Communications/ Incentives and Disincentives/ LAA/ INT/.

121. Jacome, S. Edgar. Martha Torres. Boston, MA: TPMT; 1987; 4 pp.

This case presents numerous issues of human resource management that arise in a community based distribution program in Latin America. During her tenure, a motivator in the program works under two different supervisors. Issues are raised about community involvement in CBD programs. The case could be used as the basis for a classroom discussion or to perform a written analysis.

HRM-Supervision.

CASE/ FP/ PLN/HRM/ PLN-6/ HRM-9/ ENG/ Program Planning/ Supervision/ CBD Programs/ Personnel Recruitment/ LAA/ INT/.

122. Jacques, Jocelyn and Michel Paquin. Le Budget de Programmes: Un Outil Moderne De Gestion. Montreal, Canada: Editions Agence d'Arc inc.; 1977; c1977; 310 pp; ISBN 0-88586-001-2.

This text discusses all aspects of program budgeting as a management tool. Containing seventeen chapters, the book covers the following topics: systematic program budgeting; objective setting; program structure; the budgeting process; expense categories; program analysis; cost analysis; and cost effectiveness analysis. Designed to be used as a self-study text or a reference, the book opens with a pretest and ends with a post test. The authors have written each chapter to function as a self contained unit allowing the reader to refer back to selected sections.

FIN-Shelf.

READ/ EXER/ GNL/ FIN/ PLN/ FIN-2/ FRE/ Target Setting/ Objective Setting/ Program Planning/ Fiscal Techniques/ Budgeting/ Cost Analysis/ Cost Effectiveness Analysis/ BB/ INT/.

123. Jaffe, Frederick S. Developing Statewide Family Planning Programs: A Planning Handbook Volume 1. New York, NY: The Alan Guttmacher Institute; 1974; 147 pp.

PLN-Shelf.

PLN/ ENG/.

124. Jaffe, Frederick S. (The Alan Guttmacher Institute). Developing Statewide Family Planning Programs: A Planning Handbook Volume 2 - Workbook. New York, NY: The Alan Guttmacher Institute; 1974; 212 pp.

PLN-Shelf.

PLN/ ENG/.

125. Jarowitz, Barbara. Knowledge and Practice of CBD Distributors in Honduras; 23 pp.

"This paper evaluates the training of community-based distributors in a family planning program in Honduras". The program is described in detail, followed by a section on the methodology used to conduct this evaluation. "The paper then discusses the distributors' application of specified screening procedures and the follow-up advice given to clients in a program that makes available [several contraceptive options.]" NB: There is a related report written by some of the same authors, entitled, "Distributor Performance in the Honduran CBD Program".

PLN-CBD Programs.
READ/ FP/ PLN/ PLN-6/ ENG/ Training Needs/ CBD Programs/ Training Programs/ Field Workers/ Distributors/ KAP Surveys/ HON/ INT/.

126. Kalaule, Ezekiel B., Jane Kwawu, Hammouda Bellamine (Centre for African Family Studies (CAFS)). Report on the First Anglophone Course in Management of Family Planning Programmes. 1 ed.: Centre for African Family Studies (CAFS); May 28, 1986; 91 pp.

These two volumes report on a course in Family Planning program management given at the Centre for African Studies. The course was designed to improve the efficiency and effectiveness of family planning program managers in planning, implementing and evaluating programs. The first volume is a detailed report on the planning of the course. The second volume reports on the specifics of the course. The contents include: the course goals and objectives; course content; a time table; training and learning techniques; the organization of the course; a case study integral to the course; an evaluation; and an analysis and a summary of recommendations. The content of the course has units on the following; an analysis of the environment in which family planning programs are planned and operated in Africa; different approaches to service delivery; the management process; program planning; program implementation; personnel issues; management of equipment, supplies; aspects of financial management; program evaluation; field work; and project writing.

HRM-Shelf.

COURSE/ FP/ HRM/ HRM-1/ PLN/ LOG/ FIN/ FIN-1/ LOG-1/ POL-3/ ENG/ Policy environment/ Family planning programs/ Program cycle/ Program planning/ Fiscal techniques/ Management functions/ Logistics cycle/ INT/ AFR/.

127. Kalaule, Ezekiel B. Jane Kwawu and Hammouda Bellamine (CAFS). Report on the Second Anglophone course in Management of FP Programs; November 28, 1986; 44 pp.

The report contains a list of the training objectives for the course. Included are units on: 1. analyzing the environment in which FP programs are planned and operated in Africa; 2. different approaches to FP service delivery; 3. the management process; 4. project writing; 5. FP program planning; 6. program implementation issues; and, 7. selected personnel issues. A timetable for the workshop and an evaluation sheet are also

included. Trainers could use this outline to aid them in preparing a workshop or course on any of the topics.

PLN-Shelf.

COURSE/ TOOL/ FP/ POL/ HRM/ PLN/ PLN-5/ POL-3/ HRM-1/ HRM-3/ HRM-2/ Policy Environment/ Service Delivery Systems/ Program Planning/ Family Planning Programs/ Implementation/ Management Functions/ Personnel Procedures/ Needs Assessment/ INT/.

128. Kaufman, Joan. Changes in the Health Care System in China and Its Affect on the Delivery of Family Planning Services; 1984; 13 pp.

"This paper discusses China's recent decision to establish a vertical network of family planning service centers, directly under the control of the State Family Planning Commission. The author reviews the advantages of integrated and non-integrated systems of family planning and health care and analyzes the reasons for China's decision to disaggregate the two services." This could be used as the basis for a classroom discussion on service delivery system options. NB - This is a background reading for a 2 1/2 hour session on "The separation of integrated health and family planning services in China".

PLN-Integrated programs.

READ/ FP/ PLN/ PLN-6/ POL/ POL-2/ ENG/ Integrated programs/ Culture/ Vertical family planning programs/ Policy environment/ Population policy/Service delivery systems/ Program selection/ PRC/ INT.

129. Kaufman, Joan. The Separation of integrated health and family planning services in China. Boston, MA: Management Sciences for Health; 1 pp.

This is an outline for a two and a half hour module that reviews the advantages and disadvantages of integrated health and family planning services using China as a case study. There are three readings attached to the outline (each is abstracted separately), and study/discussion questions.

PLN-Integrated Programs.

COURSE/ READ/ FP/ PLN/ PLN-6/ ENG/ Integrated programs/ Family planning programs/ PRC/ INT.

130. Ketelhohn. FODA-Diagnostico Organizacional. San Jose, Costa Rica: INCAE; 26 pp.

Transparencies or flipcharts on a specified method of strategic planning. This method, FODA, stands for strengths, opportunities, weaknesses, and constraints (fortaleza, oportunidad, debilidad, amenazas). Questions and "fill-in" charts are included to walk students through a strategic planning process.

PLN-Strategic Planning.

EXER/ CHART/ GNL/ HRM/ PLN/ HRM-10/ PLN-1/ PLN-2/ SPA/ Strategic planning/ Situational analysis/ Organizational diagnosis/ Problem solving/ Problem identification/ INT/.

131. Kielmann, Arnfried A.; and Associates. Child and Maternal Health Services in Rural India: The Narangwal Experiment - Volume 1 - Integrated Nutrition and Health Care. Baltimore, MD: The Johns Hopkins University Press for the World Bank; 1983; 256 pp; ISBN 0-8018-3064-8.

Note: A world Bank Research Publication.

PLN-Shelf.

PLN/ ENG/.

132. Kim, Kwang Woong. Management Planning for Implementation of Family Planning Programs. 2 ed. Malaysia: The Asian and Pacific Development Administration Centre; 1979: Ch. V - Evaluation; 160 pp. (Family Planning Programme Management Module Series; No. 3). This module is part of a series of training materials on various aspects of Family Planning Program Management. This module focuses on the planning process and contains the following units: 1) an introduction to planning; 2) problem solving and decision making; 3) analyzing tasks and activities; 4) pert network analysis; and 5) evaluation. Each unit contains clearly written learning objectives, exercises, and a self-test. Trainers could use all of the units, or select units or exercises as a basis for a course or workshop. The module can also be used by individuals for self-study. In addition, the author has also included recommendations for additional readings relevant to the specific units in the module.

PLN-Program Cycle.

COURSE/ EXER/ FP/ PLN/ PLN-1/ PLN-2/ PLN-3/ PLN-4/ M&E/ M&E-1/ ENG/ Structural analysis/ Goal setting/ Pert charts/ Program evaluation/ Strategic planning/ Program planning/ INT.

133. Kleczkowski, Bogdan M.; Milton I. Roemer and Albert Van Der Werff. National Health Systems and Their Reorientation towards Health for ALL: Guidance for Policy-Making. England: World Health Organization; 1984; c1984; 120 pp; ISBN 92-4-130077-9.

Note: Public Health Papers 77.

"In developed and developing countries alike, national health service systems are faced with two major problems: a low level of effectiveness and escalating costs. In adopting the concept of health for all by the year 2000 through primary health care, and the global strategy for achieving it, the Member States of the World Health Organization recognized that relevant reorientation of national health systems would be required. Such a reorientation would need to be motivated by a basic regard for equity, social responsibility, and human rights, and those responsible for system design and development would have to apply fairly simple but scientifically sound and well-organized knowledge. This book provides practical guidance on reorientation for those directly involved in the design and organization of national health systems based on primary health care.

POL-Shelf.

POL/ PLN/ Public Health Policy/ Primary Health Care/ ENG/.

134. Kols, Adrienne J., M.A., Maria J. Wawer, M.D., M.H.Sc. Assisted by Wayne Quillin, Jennifer Kinsey. Community-Based Health and Family Planning. Population Reports; November-December 1982; Series L(Number 3): pp. L-79 - L-111.

This is a comprehensive report on the multiple aspects of community based health and family planning projects. The contents address: Primary Health Care and Community-Based Family Planning; Designing or Expanding a CBD Program; Single Versus Multiple Services; Program Experience; Oral Rehydration Therapy; Treatment of Malaria; Treatment of Intestinal Parasites; Nutrition Measures; Immunization; and Other Health Measures. Throughout the text are special focus sections that provide a brief summary of topics such as: the financing of CBD programs; lessons from Asian Programs; and social marketing and health. Examples from around the world serve to illustrate points made in the text. Also included is an extensive table that gives some key information on a number of CBD projects world wide. Trainers can use this to provide participants with a comprehensive overview of this subject.

PLN-Integrated Programs.

READ/ TOOL/ FP/ PLN/ PLN-6/ ENG/ CBD programs/ Family planning programs/ Integrated programs/ Service delivery systems/ Social marketing/ INT.

135. Korten, David C. Community Management: Asian Experience and Perspectives. West Hartford, CT: Kumarian Press; c1986; 328 pp; ISBN 0-931816-43-2.

PLN-Shelf.

PLN/ ENG/.

136. Korten, Frances F. and David C. Casebook for Family Planning Management-Motivating Effective Clinic Performance. Boston, Massachusetts: The Pathfinder Fund; 1977; 338 pp.

Note: The Spanish edition of this book is currently out of print. This comprehensive casebook was developed to improve the effectiveness of management of family planning programs. "It is divided into three parts, each including a combination of conceptual materials, case problems, and case analyses. Part I focuses on the question, "what difference can management make?"...Part II looks in more detail at how management can stimulate more effective work from the operating personnel" and presents management tools to use in order to achieve this. Part III discusses the interrelationship of management tools and development strategy. Twelve cases are included in the text addressing a variety of issues affecting clinic performance including: supervision; data collection; training; and performance feedback. This book can be used for individual self-study, self-directed group study, or informal classroom use.

HRM-Shelf.

CASE/ READ/ FP/ PLN/ HRM/ HRM-1/ HRM-2/ HRM-3/ HRM-9/ HRM-10/ PLN-3/ PLN-5/ PLN-6/ ENG/ SPA/ Supervision/ Management Functions/ Target Setting/ Goal Setting/ Management Style/ Organizational Design/ Organizational Development/ Workplans/ Clinic Efficiency/

Patient Flow Analysis/ BB/ RTI FRE/ INT/.

137. Kumar, Krishna (Bureau for Program and Policy Coordination, A.I.D.). Conducting Group Interviews in Developing Countries: A.I.D. Program Design and Evaluation Methodology Report No. 8. Washington, D.C.: Agency for International Development; April 1987; 44 pp.

PLN-Shelf.

PLN/ M&E/ MIS/ Data Collection/ Needs Assessment/ IEC/ Focus Groups/ ENG.

138. Labbok, M.H., M.L. Jacobson, R.L. Parker, F. Shah. Implementing Community Health Worker/Family Planning CBD Through Church Health Missions in Kenya: Analysis of Baseline Family Planning Data. Washington, D.C.: USAID under Contract AID/DSPE-C00055; November 1985; 11 pp.

This is a draft report on four operations research projects in Kenya. The projects were designed to assess a variety of management questions arising from a clinic-based family planning delivery system, run by church health missions. As part of their effort, "the health missions were seeking ways to extend the impact of their services." The report discusses the project methodology and findings, with supplemental data appearing in table format.

PLN-CBD Programs.

READ/ FP/ PLN/ PLN-6/ ENG/ Operations research/ CBD programs/ Religious groups/ Clinic based delivery systems/ KEN/ INT.

139. Lagman, Professor Oscar P. Jr. Office Of Health Education And Personnel Training. Manila, Philippines: Asian Institute of Management; 33 pp.

Note: This case is contained in the AIM Casebook.

In an effort to improve the effectiveness of the motivators in the Philippine population program, the Project Director for Personnel training is reviewing the objectives and the content of the training. The existing program is described briefly, including a summary of qualifications that must be met by the motivators in order to fill the role. Attached to the case are sample course syllabi that have been used for previous programs. Trainers could use this case to have participants plan a new course for motivators, or to perform an analysis on the training program.

PLN-Shelf.

CASE/ FP/ TOT/ PLN/ HRM/ TOT-2/ PLN-4/ ENG/ Staff Development/ In-Service Training/ Curriculum Development/ Course Design/ PPI/ INT.

140. Lapham, Robert J. and W. Parker Mauldin. Contraceptive Prevalence: The Influence of Organized Family Planning Programs. *Studies in Family Planning*; May/ June 1985; 16(3): 117-137. This technical paper discusses analyses that were conducted to determine the impact of socio-economic factors and family planning program efforts on contraceptive prevalence in 73 less developed countries. The authors detail the criteria used and the methodology by which it was applied. Included is a summary description of thirty items used to assess the efforts of family planning programs within the countries examined in the analysis. There is also a numerical rating system which was devised to help planners in setting priorities. Trainers might use this as a background for preparing a training session. The tables and summary could be used to discuss the variables affecting contraceptive prevalence in selected countries.

PLN-Strategic Planning.

READ/ FP/ PLN/ POL/ M&E/ PLN-2/ POL-3/ ENG/ Strategic Planning/ Target Setting/ Demographic Factors/ Socio-Economic Factors/ INT/.

141. Lapham, Robert J.; George B. Simmons. *Organizing for Effective Family Planning Programs*. Washington, D.C.: National Academy Press; 1987; 706 pp.

Note: This represents a collaborative effort of the following groups: Working Group on Family Planning Effectiveness; Committee on Population; Commission on Behavioral and Social Sciences Education; and the National Research Council.

"The chapters in this comprehensive volume describe specific program elements and their contribution to the effectiveness of organized family planning programs in the developing world." Divided into seven sections, the authors address the following: the environment of family planning programs; program management and program elements; special modes of delivery; client-provider transactions; and methodological issues. "This collection of papers represents a multi-disciplinary assessment of the different elements contributing to family planning program effectiveness and is a very current summary of the information presently available." Managers and trainers can use this volume to update their knowledge of the topics presented. Trainers could also use specific sections as background reading for a training session.

PLN-Shelf.

READ/ FP/ PLN/ POL/ PLN-6/ PLN-4/ PLN-5/ ENG/ CBD programs/ Family Planning Programs/ Policy Environment/ Operations Planning/ Resource Allocation/ Family Planning Policy/ Availability/ Access/ User Perspective/ Integration Training/ Social Marketing/ INT/.

142. Lisikin, Laurie, Sc.M., Richard Blackburn, M.S., Joseph H. Maier. AIDS - A Public Health Crisis. Population Reports; July-August 1986; Series L(Number 6): pp. L-194 - L-227.

This is a comprehensive report on AIDS and the public health perspective. Contents address: Epidemiology; Infection; Transmission; Education Programs; Implications for Health Services; and Other Potential Public Health Measures. The report also includes focus pieces that highlight specific issues. The topics covered range from, "Vaccine Against AIDS is Years Away," to "International Effort to Stop AIDS is Under Way." In addition, there is a table that lists HIV prevalence by country.

PLN-Integrated Programs.
READ/ TOOL/ FP/ PLN/ PLN-6/ ENG/ Integrated programs/ AIDS/
Program planning/ INT.

143. (USAID). Logical Framework; 5 pp.

The purpose of this reading is to "enable the decision makers to identify project purposes and goals and plan for project outputs and inputs." The model presented has "been used by USAID Missions to: 1) aid in planning a project; 2) provide measure to evaluate a project; and 3) state assumptions about causal linkages." The figures included in the text illustrate how the logical framework can be used for project design. There is also an example of one to demonstrate the application of the model to a specific project.

PLN-Program Cycle.
READ/ TOOL/ GNL/ PLN/ PLN-5/ ENG/ Project Development/ Program
Cycle/ DOM/.

144. Lopez, Mario Antonio G. Dwijaya Mail-Order Condoms. Manila, Philipines: Asian Institute of Management; 1979; 12 pp.

Note: This case is contained in the AIM Casebook.

This case reports on an experimental mail-order condom distribution project conducted in Indonesia. The origins and the experimental process are described including a discussion of some of the problems that were experienced. The case concludes with a series of questions posed by someone reviewing the project. The questions raise issues about the design and the evaluation of the experiment. Trainers could use this as the basis for a classroom discussion on project design.

PLN-Shelf.
CASE/ READ/ FP/ PLN/ PLN-6/ PLN-5/ ENG/ Project Development/
Condom User Perspective/ Service Delivery Systems/ Performance
Indicators/ IND/ INT/.

145. Lovelock, Christopher H., Ph.D. Concepts and Strategies for Health Marketers. Cooper, Philip D., Editor: Aspen Systems; 1979: 19-28; 9 pp.

This article discusses the importance of fully considering the components of the marketing mix. Specifically aimed at the health sector, the article includes sections on pricing, distribution, communications, competition, market segmentation, health education. The text contains examples from health settings to illustrate points made in the text. Trainers could use this as a background reading for any session on health marketing concepts.

PLN- Health Marketing.

READ/ MIM/ PLN/ PLN-5/ ENG/ Marketing/ Competitive Strategy/ Segmentation/Pricing Policies/ Communication/ Health Education/ INT/.

146. Mahmud, S.K. Project Formulation and Implementation I. Administration Journal; Jan.-June 1986; 6(14): 1-15.

Note: Discusses project format as analytical tool.

In this article the author discusses the variables in project planning that can contribute towards the effective and efficient use of scarce resources. The article covers: a definition of a project; why the project approach might be employed; and, project preparation and analysis, including all of the necessary steps. The brief opening section on project definition might be useful reading for trainers in preparing a unit on project program planning.

PLN- Program Cycle.

Read/ GLN/ PLN/ PLN-4/ ENG/ Program Cycle/ Program Planning/ Implementation/ Work Plans/ INT/.

147. Mamlouk, Maria E., Amy Ong Tsui (USAID, Chapel Hill). An Assessment of Family Planning Needs and Costs for Selected Latin America and Caribbean Countries; 1986; 14 pp.

Note: Paper presented at the 1986 Annual Meeting of the American Public Health Association, September 28- October 3, Las Vegas.

This paper was prepared for the purpose of projecting the family planning needs and costs in selected Latin American and Caribbean countries between 1985 and 2000, in order to achieve the national fertility objectives that the individual countries have set.

There is a discussion of the methodology used for the projections and a summary of the results of the projections in terms of total numbers of contraceptive users and prevalence levels. Also included is a discussion of the costs to the consumer in obtaining the chosen family planning method. Trainers might use this as a reading to illustrate the concept of goal setting as a component of long range planning.

PLN-Goal setting.

READ/ FP/ PLN/ PLN-1/ PLN-3/ ENG/ Strategic planning/ Goal setting/ INT/ LAC.

148. Management Sciences for Health. Operational Planning Overheads. Boston, Massachusetts; 23 pp.

This notebook contains a package of overhead transparencies to be used by trainers in a presentation on operational planning.

PLN-Shelf.

TOOL/ GNL/ PLN/ PLN-4/ PLN-5/ ENG/ Situational analysis/
Objective setting/ Goal setting/ Implementation/ MBOR/ INT/.

149. Managing Small Institutions: Strategy and Marketing; 16 pp. Compiled for use in an academic setting, this is a collection of writings excerpted from larger works that all focus on strategy and marketing. The emphasis is on applying strategic planning skills and techniques in a corporate setting, but the collection contains a section on what strategy is, as well as an outline to review and evaluate the strategy of an organization. These sections might prove useful to trainers. The first could be used as background reading to prepare a lecture and the outline might be adapted to serve as an instructional tool for trainers.

PLN-Strategic Planning.

READ/ TOOL/ GNL/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/
Marketing/ Management Style/ Situational Analysis/ INT/.

150. Managing Small Institutions: Strategy and Marketing - Note 8: Ten Important Steps; 1 p.

This is a list of ten important steps for successful marketing in the health services industry. Trainers could use this as a hand-out for a session on health marketing.

PLN-Health Marketing.

TOOL/ HLth/ PLN/ PLN-5/ ENG/ Marketing/ INT/.

151. Materia Politica Empresarial (Business Policy Material; 10 pp.

Dealing with incomplete and contradictory information in less developed countries.

POL, PLN, MIS.

TOOL/ GEN/ PLN/ POL/ MIS/ SPA/ INT/.

152. Mayo-Smith, Ian and Nancy L. Ruther. Achieving Improved Performance In Public Organizations; A Guide For Managers. West Hartford, Connecticut: Kumarian Press; c1986; 126 pp. (Kumarian Press Guidelines Series); ISBN 0-931816-04-1.

This is a step by step guide for planning and implementing a performance improvement plan. The manual has five stages and twenty-four steps. It is designed to be used with process consultants working with members of the management team of an organization to bring about improvements in its performance in a total organizational effort. It can also be used by individual managers in an effort to improve performance in the areas they are responsible for. It is an effective tool written in a clear and concise manner and should be useful to public managers.

PLN-Shelf.

MAN/ GNL/ PLN/ PLN-5/ ENG/ Program Planning/ Implementation/
INT/.

153. McMahon, Rosemary, Elizabeth Barton, Maurice Piot. On Being In Charge: A Guide for Middle-Level Management in Primary Health Care (Si Vous Etes Chargez De...). 2 ed. Switerland: World Health Organization; 1984; 366 pp.

This comprehensive guide book incorporates narrative and exercises designed to help middle level health care managers improve their skills. It is written in such a way that the reader can select a relevant section of the book and read it without reading the information that precedes or follows it. The book is arranged in four parts. Part I explains in simple terms the general principles of management as a system of thought, and the functions of mangement. Part II is concerned with personnel relations: how to encourage and coordinate a health team, to communicate with groups of people and to supervise in a supportive way. Part III presents methods for the management of equipment and drugs and the functioning of a health center. Part IV deals with how to apply principles, methods, and management skills to the planning, implementation and evaluation of an area health service. Each part has several chapters and each chapter begins with a statement of learning objectives. Exercises related to specific chapters are located in the book. Trainers could use this book for background readings, exercises, or to aid them in designing course components.

HRM-Shelf.

READ/ MANUAL/ EXER/ HLTH/ PLN/ LOG/ MIS/ M&E/ HRM/ HRM-1/ HRM-9/ ENG/ FRE/ Management General/ Management Functions/ Management of Groups/ Interpersonal Communications/ Management Style/ Supervision/ Planning/ Implementation/ Inventory Management/ Procurement/ Evaluation/ Program Evaluation/ Needs Assesssment/ MBOR/ Situational Analysis/ Mission Statement and Objective/ Data Sources and Collection Methods/ Program Monitoring Systems/ BB/ INT/.

154. The Medex Group (University of Hawaii). The Medex Primary Health Care Series. Honolulu, HI: The Medex Group; 35 Vol. The thirty five volumes in this series comprise a compendium of field-tested primary health care methods and materials. Using modules, manuals, and workbooks, "the Series stresses the training of middle level health personnel as trainers and supervisors as well as providers of health services. The series also places importance on community health workers and on strengthening the associated mangement systems needed to support the effective delivery of primary health care services at the local level."

Shelf.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

155. Medex Primary Health Care Series. Management Training Manuals and Workbooks. Honolulu, Hawaii: University of Hawaii, John A. Burns School of Medicine; 1983.

REF-SHELF.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

156. Mitchell, Marc, M.D., M.B.A. (Management Sciences for Health). Workshop on Management for Health Administrators; August 10-11 1987; 8 pp.

This serves as the framework for a two day training session on planning, implemetation and monitoring. In day one there is a case study of the problems faced by a new Director-General of health in a ficticious African country. The case is presented, followed by a list of discussion questions. In the second session there is an outline for a teaching session on planning, implementation and monitoring which emphasizes the linkages between these processes and some of the common problems with each.

PLN- Program Cycle.

CASE/ COURSE/ HLTH/ PLN/ PLN-5/ PLN-4/ ENG/ Program Planning/ Implementation/ Program Evaluation/ Program Monitoring Systems/ INT/.

157. Morrisey, George L. Management by Objectives and Results for Business and Industry. 2 ed. Reading, MA: Addison-Wesley Publishing Compant; 1984; 252 pp.

This is a detailed how-to book using examples from the work environment to illustrate all facets of management by objectives and results. It is written both to serve as a text for a training program and can also be used as a manual for individual use on the subject. In the preface, the author helps the reader to determine which portions of the book can serve his/her individual needs. Content areas addressed in the text include: Mission statement and objectives; setting, writing, and evaluating objectives; preparing action plans; establishing controls; communications; and implementation. There is a workbook and an audio cassette available separately which can be used to supplement the text.

PLN-Shelf.

READ/ GNL/ PLN/ HRM/ PLN-2/ ENG/ MBOR/ Workplans/ Interpersonal communications/ Objective setting/ Implementation/ Management functions/ Strategic planning/ Program planning/ Mission statement and objectives/ INT.

158. Mulvaney, John. Analysis Bar Charting: a simplified critical path analysis technique. Bethesda, MD: Management Planning and Control Systems; c1969; 100 pp.

PLN-Shelf.

PLN/ ENG/.

159. National Council for International Health. Management Issues in Health Programs in the Developing World. Washington, D.C.: NCIH; May 1986; 387 pp.
HRM-Shelf.
HRM/ PLN/ POL/ MIS/ ENG/.

160. Naturaleza y Diseno de Sistemas de Control (The Nature and Design of Control Systems); 9 pp.
Implementation of planning, with the emphasis on control of human resources.
HRM, PLN - planning implementation.
TOOL/ GEN/ PLN/ HRM/ SPA/ INT/ planning implementation/ human resources/.

161. NCIH. Alternative Health Delivery Systems: Can They Serve The Public Interest In Third World Settings? Washington, D.C.; August 1984; 145 pp.
This is a collection of papers presented at a workshop "convened to examine the experience of alternative health care delivery systems around the world which employ cooperative concepts. Divided into three parts, the first chapter looks at what is known about cooperative concepts and how they might be applied. "In Chapter II, HMOs and their potential applicability to third world settings are examined...In the final chapter, two noted economists discuss recurring patterns and issues of health care financing in the developing countries." Incorporated into the text are discussions about program planning options and operations research.
PLN-SHelf.
READ/ FP/ PLN/ FIN/ PLN-6/ FIN-3/ ENG/ Operations Research/ Service Delivery Systems/ Community Training/ Health Care Financing/ INT/.

162. Newman, Harvey: William O'Reilly and Alfons Van Wijk. Self-Evaluation and Planning for Human Service Organizations. New York, NY: AMACOM - American Management Association; 1987; 177 pp.
PLN-Shelf.
PLN/ ENG/.

163. Nicholas, David D., M.D., M.P.H. Lessons Learned from Operations Research in Primary Health Care. Chevy Chase, Maryland: PRICOR; November 20, 1985; 11 pp.
This paper "reviews the operations research approach developed by PRICOR,...and presents some of the important results from selected PRICOR studies..." Operations research is described as "a systematic, problem solving process consisting of three phases:problem analysis, development of solutions, and solutions validation." Each phase is outlined in the paper. In the remaining pages some of the methodologic lessons learned from the research experience are presented. These include a look at studies on the following issues:Productivity; Community Financing; Oral Rehydration Therapy; and Community Health Workers.

PLN-Operations Research.

READ/ HLTH/ PLN/ PLN-5/ ENG/ Operations Research/ Community Financing/ Resource Allocation/ Community Health Workers/ INT/.

164. Office National de la Famille et de la Population (ONAPO). Diagnostic des problemes et programmation des activites: Document de base pour une strategie de gestion; 65 pp.

Methodological approach to needs assessment and strategic planning developed by ONAPO in Tunisia. A step by step guide to arrive at program priorities and implementation plans. Consists of several worksheets. The second part illustrates the process with real data from several "gouvernorats" of Tunisia.

PLN-Program Cycle.

TOOL/ FP/ PLN/ PLN-4/ FRE/ Strategic Planning/ Situational Analysis/ GOAL Setting/ Target Setting/ Objective Setting/ Needs Assessment/ Workplans/ Family Planning Programs/ Public Sector Programs/ Contraceptive Prevalence Surveys/ TUN/ INT/.

165. Office National du Planning Familiale et de la Population (ONAPO). Seminaire: Diagnostic programmation evaluation; 40 pp.

Example of how to use demographic and other survey data to establish programmatic priorities, draw up an implementation and evaluation plan. Proceedings of a workshop held in Tunis, 3-15 May, 1982. See also: Diagnostic des problemes et programmation des activites - Document de base pour une strategie de gestion - Approche methodologique (also by ONAPO).

PLN-Program Cycle.

COURSE/ FP/ PLN/ PLN-4/ FRE/ Strategic Planning/ Situational Analysis/ Goal Setting/ Target Setting/ Needs Assessment/ Objective Setting/ Workplans/ Family Planning Programs/ Public Sector Programs/ Contraceptive Prevalence Surveys/ TUN/ INT/.

166. Overholt, Catherine; Mary B> Anderson, Kathleen Cloud, and James E. Austin. Gender Roles in Development Projects: A Case Book. West Hartford, CT: Kumarian Press; c1985; 326 pp; ISBN 0-931816-15-7.

PLN-Shelf.

CASE/ PLN/ ENG/ IND/ TAN/ KEN/ PER/ IDI/ INT/.

167. Overseas Education Fund. Organizational Techniques.

Washington, D.C.: Overseas Education Fund of the League of Women Voters; 58 pp.

This comprehensive, clearly written manual, details the processes involved in setting up an organization and in helping to ensure success. Using simple language and terminology, the 10 chapters cover the following: 1) Goals, Objectives, and Benefits of Organizing; 2) Structure of Organizations and Board; 3) Membership and Development of Members; 4) The Board; 5) Planning; 6) Budget; 7) Reports; 8) Communication; 9) Money and Other Resources; 10) Building Up an Organization and Analyzing Problems. This manual was written for use in Indonesia but it is readily adaptable for trainers in developing country situations world wide. Examples and illustrations supplement the text and

can be used to make overhead transparencies. The manual also contains three useful appendices: a) a section on obstacles to good communication; b) a glossary of terms; and c) an example that illustrates the planning of a community literacy project.

PLN-Shelf.

MAN/ GNL/ PLN/ FIN/ HRM/ Organizational design/ Goal setting/ Situational analysis/ Needs assessment/ Budgeting/ INT.

168. PACT (Private Agencies Collaborating Together). Monitoring and Evaluating Small Business Projects: A step by step guide. U.S.A.: Editorial PKG.; c1987; 262 pp; ISBN 0-942127-00-5. Written for private development organisations this manual covers aspects of strategic planning, operations planning and program monitoring and evaluation. The authors use a clear systematic approach with a master plan worksheet format that takes readers through each step of the process. Illustrative scenarios or mini-cases provide readers with an opportunity to assess problems and using the worksheet, to develop a rationale and strategy to correct them. The eight steps discussed are: 1) Defining small business; 2) defining your small business assistance program; 3) defining your purpose; 4) choosing economic indicators and tools; 5) choosing social indicators and tools; 6) choosing indicators that monitor your effectiveness; 7) managing your plan; and 8) using the information. While the focus of this manual is small business projects, there are many sections relevant to family planning projects in developing countries. NB: The book contains two case studies illustrating how different agencies have developed international monitoring and evaluation systems that work for them. They are Foster Parents Plan International, Mindoro, Philippines; and Partnership for Productivity International.

M&E-Shelf.

READ/ MAN/ CASE/ GNL/ M&E/ PLN/ M&E-1/ M&E-2/ M&E-3/ PLN-1/ PLN-2/ PLN-3/ PLN-5/ ENG/ Program Evaluation/ Program Effectiveness/ Strategic Planning/ Mission Statement and Objectives/ Project Development/ INT/.

169. Participatory Research - An Introduction. Tobias, Kathleen Jo ed. New Delhi: Society for Participatory Research in Asia; 1982; 48 pp. (Volume 3).

"This reading is intended for use by workers in field settings concerned with involving grass-roots people in social action...[The authors define] participatory research as being composed of three inter-related processes: 1. collective investigation of problems and issues with the active participation of the constituency in the entire process; 2. collective analysis of the problem; and 3. collective action aimed at solving these problems." The text contains examples of projects conducted around the world which illustrate participating research in practice. Four case studies "demonstrate a wide variety of problems, approaches and outcomes that have occurred in participatory research in very different political, social, and economic contexts."

PLN- Operations Research.

READ/ GNL/ PLN/ PLN-5/ ENG/ Operations Research/ Community Participation/INT/.

170. Patient Flow Analysis in General Outpatient Clinics: Instructions for Collecting Data. Family Planning PFA Manual prepared by Centers for Disease Control and Oklahoma State Department of Health. Atlanta, Georgia: Department of Health and Human Services Public Health Service; September 1986; 26 pp. Note: 3 copies.

This is a comprehensive manual on how to conduct a patient flow analysis for outpatient clinics. It contains detailed instructions on coding data collection and completing necessary forms. Each of the forms used in this system is also included in the manual.

PLN-Clinic Efficiency.

MAN/ HLTH/ PLN/ PLN-6/ Data Collection/ MIS/ Program Monitoring Systems/ Clinic Efficiency/ Patient Flow Analysis/ DOM/.

171. Paul, Samuel. Sa Administracion Estrategica de los Programas de Desarrollo: Evidencia de un Estudio Internacional (The Strategic Management of Development Programs: Evidence from an International Study): Indian Institute of Management, Restricted Distribution; 1981; 34 pp.

The article explores the reasons why some development programs are more successful than others by looking at seven successful ones and what they have in common.

PLN - strategic planning.

TOOL/ GEN/ PLN/ SPA/ strategic planning/ INT/.

172. Perkin, Gordon and Lyle Saunders. Extending Contraceptive Use; 16 pp.

"The focus of this paper is on family planning as an organized activity aimed at improving the health of women and children and the welfare of families...It lists, and briefly discusses, a set of assertions about family planning programs in their diverse forms around the world and suggests how they might be changed so as to become more effective." In the discussion about about program changes, the authors raise issues about contraceptive methods and service delivery systems and their interrelationship as it affects programs. This could be used as a background reading for a session on program planning.

PLN-Improving Access to Family Planning.

READ/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Operations Planning/ Program Planning/ Program Selection/ Service Delivery Systems/ Family Planning Programs/ Contraceptive Methods/ INT/.

173. Perkins, Richard F. Dr. (Organization Development Consultants, Inc.). The Centre For Population Activities Women In Management Seminar Management By Objectives. Richmond, Virginia: ODC. Inc.; 33 pp.

This workbook focuses on the processes involved in management by objective (MBOR). The contents include sections on: Managerial Planning; what is Management By Objectives; Basic Steps in Management By Objectives; a series of sample forms that can be used in the planning process; an MBO work plan; and suggested criteria for Evaluating the Planning. Appendices are also included. Trainers could use this comprehensive workbook for any session on management by objectives and results (MBOR). The forms included could be used to develop an exercise on the skills and techniques employed in the MBOR program.

PLN- Program Cycle.

Man/ Tool/ Read/ GNL/ PLN/ PLN-2/ PLN-3/ PLN-5/ MBOR/ Program Planning/ Program Cycle/ Implementation/ Objective Setting/ Mission Statement and Objectives/ Workplans/ INT/.

174. Phillips, James F., Ruth Simmons, J. Chakraborty, and A.I. Chowdhury. Integrating Health Services into an MCH-FP Program: Lessons from Matlab, Bangladesh. Studies in Family Planning; July/August 1984; 15(Number 4): pp. 153-161.

"This paper reports on a project in Matlab, Bangladesh, where family planning and MCH services were added in stages. The paper addresses the question as to whether the addition of health services contributed to family planning efficiency in Matlab in a program launched with minimal MCH services." The paper discusses integration of services using a variety of different strategies, concluding with a section on the implications revealed by the project.

PLN-Integrated Programs.

READ/ FP/ PLN/ PLN-6/ ENG/ Family planning programs/ Integrated programs/ MCH programs/ BAN/ INT.

175. Planned Parenthood and Women's Development (IPPF Africa Region). Planning and Management of Community Projects: A Manual on Programme Development, Leadership Training and Management of Group Projects / Planification et Gestion des Programmes Communautaires: Manuel sur L'Elaboration des Programmes, La Fonctions d'Animation et La Gestion des Programmes de Groupe. London: IPPF; 98 pp.

Note: 1 copy English, 1 copy French.

PLN-Shelf.

PLN/ FRE/ ENG/ INT/.

176. The Population Council. Studies in Family Planning; 1979-. The FPMT library contains issues of the bimonthly journal Studies in Family Planning, dating from 1979. An annual index lists articles published each year by author, subject and geographic area. The subject and geographic indexes list articles alphabetically by title. Studies in Family Planning is an international journal that addresses family planning and related health and development issues, with emphasis on activities in developing countries.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS M&E/ FIN/ IE&C/ INT/.

177. Porter, Michael. Analisis Estructural de los Sectores Industriales (Structural Analysis of the Industrial Sectors). Mexico: Compania Editorial Continental; 1982; 31 pp. (Competitive Strategies).

A fairly detailed account of the industrial sector and what it needs to succeed.

PLN - strategy.

TOOL/ GEN/ PLN/ SPA/ strategy/ INT.

178. Porter, Michael E. How Competitive Forces Shape Strategy. Harvard Business Review; March-April 1979; 57(2): 137-145.

Describes five forces that determine nature and degree of competition in an industry and how to establish a strategic agenda to deal with these forces. Although written for US industry, concepts can be transplanted to non-profit world, especially where competition characterizes the environment in which the services are delivered. Written for top-level managers.

PLN-Strategic Planning.

READ/ GNL/ PLN/ ENG/ Strategic Planning/ DOM/ INT.

179. Powell, Victor. Improving Public Enterprise Performance: Concepts and Techniques [Management Development Series No. 22]. Geneva: International Labour Office; c1987; 226 pp; ISBN 92-2-105563-9.

STR/PLN-Shelf.

PLN/ M&E/ MIS/ Strategic Planning/ ENG/ INT/.

180. Preocupaciones Crecientes: Temas de Interes Particular a Duenos y Gerentes de Negocios Pequenos (Growing Worries: Subjects of Particular Interest to Owners and Managers of Small Businesses); 9 pp.

Dealing with growth in a small company - gives five steps of growth which a company must undertake.

TOOL/ GEN/ PLN/ growth/ SPA/ INT/.

181. PRICOR Bulletin. Chevy Chase, Maryland; May, 1985; 8 pp. This is a bulletin put out by PRICOR (Primary Health Care Operations Research) to introduce their 5 year project. The bulletin contains pieces on "What is Operations Research" and "How to Conduct an O.R. Study". There are also four presentations on topics that Operations Research addresses: Community Health Workers; Community Financing; Community Organization; and, Oral Rehydration Therapy. For each topic, examples of in-country Operations Research Projects are given to illustrate how the methodology can be applied. This could be used by trainers to introduce a session on Operations Research. PLN-Operations Research.
READ/ HLTH/ PLN/ PLN-5/ ENG/ Operations Research/ Community Health Workers/ Community Financing/ INT/.
182. Principios Basicos en la Generacion de Fondos (Basic Principles in the Generation of Funds). New York: Amherst H. Wilder Foundation; 1986; 5 pp. (Strategic Planning). An outline on basic methods of fund generation.
PLN - strategic planning.
TOOL/ GEN/ PLN/ SPA/ strategic planning/ INT/.
183. Program Implementation Module: Pathfinder Fund; 4 pp. This contains a brief outline for four units that comprise an eleven unit module on program implementation. Included in this package are: Needs Assessment; Program Planning; Community Involvement; Cultural Issues; and User Perspective. For each, there is a listing of the issues to be addressed by the content of the unit, and the learning objectives. Trainers might find this a useful tool to help in preparing a unit on any of the topics listed above.
PLN-Program Cycle.
Tool/ COURSE/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ Needs Assessment/ User Perspective/ Community Survey/ Program Planning/ INT/.
184. Programacion (Programming): INCAE, distribution restricted.; 7 pp.
Note: Translated by Roberto Mendoza, INCAE.
The article deals with the coordination of various programs to achieve the organization's goals as related to financial planning and strategic planning. The article gives an overview of the process.
PLN - strategic planning.
TOOL/ GEN/ PLN/ SPA/ PLN - strategic planning/ INT/.

185. Ramos, Miguel, M.D., Eduardo Mostajo, M.D., Rosa Monge, I.O., Luis Aller Atucha, Lic., Raquel Iparraguirre, Obs., James R. Roreit, Dr. Ph., Jose Garcia Nunez, M.D. (INPPARES, The Population Council). An Experiment to Improve an IUD Insertion and Medical Back-Up Component of a Community Based Distribution in Lima, Peru: Paper presented at the Annual Meeting of the American Public Health Association, Las Vegas, Nevada. September 28 - October 3, 1986.

"This paper reports the results of the first six months of a planned twelve month experiment to determine the most effective and efficient frequency for offering medical back-up services in support of a Community Based Distribution of contraceptives in Lima, Peru." Included, are narrative sections that describe the project and the methodology used in the experiment. The results of the study are also provided.

PLN-CDB Programs.

READ/ FP/ PLN/ PLN-6/ ENG/ CBD programs/ Operations research/ IUD/ PER/ INT.

186. Rao, K. L. K. Marketing Perspectives of Public Enterprises in Developing Countries. Ljubljana, Yugoslavia: International Center ofr Public Enterprises in Developing Countries; c1986; 211 pp; ISBN 92-9038-090-x.

STR/PLN-Shelf.

PLN/ Strategic Planning/ ENG/ INT/.

187. Reinke, William A. Issues in the Supervision of CBD Projects. Baltimore, MD: The Johns Hopkins University, School of Hygiene and Public Health; 1983; 137 pp.

This paper is a compilation of literature, discussions and interviews on the supervision of family planning community based distribution projects. It is a comprehensive approach to the subject and is comprised of sections covering the following: 1) the selection and training of supervisors, including proposed content, format and methods for training; 2) the directing and controlling functions of supervision; 3) the support functions of supervision; 4) organizational support arrangements and management; and 5) principal recommendations for action research. Examples from numerous programs throughout the world are cited in the text. Sample forms, tables, and questionnaires accompany each section. Could be used as background reading, and as a manual for participants to refer to in their work setting. It could also be useful to trainers in preparing a course on supervision of CBD personnel.

HRM-Supervision.

TOOLS/ MANUAL/ READ/ FP/ HRM/ PLN/ PLN-6/ HRM-9/ ENG/ CBD programs/ management functions/ Personnel recruitment/ Personnel selection/ Supervision/ Training/ Remuneration system/ Organizational development/ Village health worker/ INT.

188. Research Division, Office of Population, Bureau of Science and Technology, Agency for International Development. Operations Research Program; January 1984; 25 pp.

This document contains an overview of the Family Planning Operations Research Program of the Office of Population. A brief description is given of the principal components of the project enumerating the project sites, listing the agencies involved in project implementation, and defining the study design. Two brief summaries are included: insights into service delivery issues; and insights into project design and evaluation. The remainder of the document is a table that provides a description of each project, the status of the project and the results of the project.

PLN-Operations Research.

READ/ FP/ PLN/ PLN-5/ ENG/ Operations Research/ INT/.

189. Reyes, Alejandro A. Bali (B). Manila, Philippines: Asian Institute of Management; 1978; 15 pp.

Note: This case is located in the AIM Casebook.

This case reports on changes implemented in the Balinese family planning program between late 1974 and 1977. Background information is provided on the Indonesian program and on the organization responsible for family planning in the country, the BKKBN. The village system is described, as is the rationale for using this system for the family planning program. Following these introductory sections, the author reports on how the village system is being implemented and the results to date. Tables and charts supplement the text. Trainers could use this case in tandem with Bali (A), written by Felipe B. Alfonso.

PLN-Shelf.

CASE/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Service Delivery Systems/ Vertical Family Planning Programs/ Community Participation/ IND/ INT/.

190. Reynolds, Jack, Ph.D. Delivering Family Planning Services: Autonomous v.s. Integrated Clinics. Family Planning Perspectives; January 1970; Volume 2(Number 1): pp. 15-22.

The article looks at a study that compares different service delivery options for family planning. The parameters and methodologies of the study are presented, followed by the findings which explore both the community and the client perspective. The article concludes with a summary of the study and a section on recommendations.

PLN-Integrated Programs.

READ/ FP/ PLN/ PLN-6/ ENG/ Integrated programs/ Service delivery systems/ Vertical family planning programs/ DOM.

191. Rifkin, Susan B. *Planner's Approaches to Community Participation in Health Programs: Theory and Reality*. CONTACT; Oct 1983; (no. 75): pp3-16.

This comprehensive article presents different approaches to planning health care projects involving the community. The three approaches presented are: 1. the medical approach; 2. the health planning approach; and 3. the community development approach. Following is a discussion of the various program options and conclusions about the options. Trainers could use this article with groups who will be responsible to developing a health plan at the local or regional level.

PLN-Program Cycle.

READ/ HLTH/ PLN/ POL/ PLN-4/ PLN-5/ ENG/ Program Planning/ Community Participation/ INT/.

192. Roberto, Eduardo L. *Managing Community Mobilization For Population Objectives*. Manila, Philippines: Asian Institute of Management; 1978; 18 pp.

Note: This is contained in the AIM Casebook, but is not a case. This paper focuses on the management issues that revolve around mobilizing communities towards participation in population activities. The author discusses the link between community development and community mobilisation, highlighting the key management issues. Examples from projects around the world illustrate the following important concepts: preconditions for mobilization; the entry strategy; and, implementation. A concluding summary provides a detailed list of guidelines and considerations for program managers who like to bring the community mobilization thrust into their program.

PLN-Shelf.

REAL/ FP/ PLN/ POL/ PLN-5/ PLN-6/ ENG/ Program Planning/ Needs Assessment/ CBD Programs/ Population Development Debate/ Community Relations/ Implementation/ INT/.

193. Roberto, Eduardo L. (International Committee on the Management of Population Programs). *Research Utilization In The Philippines Population Program*. Manila, Philippines: Asian Institute of Management; 24 pp.

Note: This case is contained in the AIM Casebook.

In this case, the associate director for the Planning Division at the Philippine Population Programme is trying to design the research program for the organization. Background details on the organizational structure and the history of the division provide a sense of the problems the director faces in trying to assign research priorities, and determining how to accommodate a research utilization component in the research program. Five exhibits accompany the case. Included are two organizational charts, a flow chart for processing research proposals, and two narratives on the utilization of research findings.

PLN-Shelf.

CASE/ FP/ PLN/ M&E/ PLN-1/ PLN-4/ PLN-5/ ENG/ Program Planning/ Operations Planning/ Strategic Planning/ PPI/ INT/.

194. Rosenfield, M.D., Regina McNamara, Dr. P.H. Community-Oriented Health, Nutrition and Family Planning Services: Overview and Lessons from Operations Research. New York, NY: Center for Population and Family Health, Faculty of Medicine, Columbia University; October 1985; 24 pp. (Working Paper Series; Number 21).

This paper provides a comprehensive overview of the key issues and problems in the delivery of integrated, health, nutrition and family planning services. Divided into three parts, the paper begins by defining some of the program needs in the developing world and uses two cases to illustrate the types of problems challenging both planners and communities. In the second part of the paper, options for integrated programs are presented, with examples from around the world. The final section examines the role of research, and includes a summary of research findings and future opportunities for planning and implementing integrated programs. Trainers would use this to introduce the concept of integrated programs. The summary of findings and suggestions might serve as a focal point to discuss how these concepts can be adapted to fit the criteria of a specific country or community.

PLN-Integrated Programs.
READ/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Integrated Programs/ CBD Programs/ Operations Research/ Service Delivery Systems/ Nutrition/ INT/.

195. Ross, A., J. Wray, A. Rosenfield, D. Lauro. Community Based Distribution: A Global Review. New York, NY: Center for Population and Family Health, Columbia University; September 1986; 26 pp. (Working Paper Series; (Working Paper 28)).

This paper "presents the elements of CBD programs, including a number of conditions for their effective operation that have emerged from experience so far. Following this is an assessment of the contraceptive methods used, both actual and potential. A review of the global picture of CBD activity is presented with common data on a large number of countries. The paper concludes with suggestions regarding the evaluation of CBD programs provided by this paper could be useful to trainers both in selecting illustrations for a lecture on community based distribution, and for giving students a broad overview of the subject.

PLN-CBD Programs.
READ/ FP/ PLN/ PLN-6/ ENG/ CBD Programs/ Program planning/ Service delivery systems/ Family planning programs/ Community health workers/ INT.

196. Ross, John A. Ph. D. Family Planning Pilot Project In Africa: Review and Synthesis. New York: Center for Population and Family Health; January 1986; 65 pp. (Working Paper 24).

"This paper reviews and synthesizes lessons learned through a variety of family planning operations research and pilot projects carried out [in Africa] over the past fifteen years. The substantive focus is on family planning projects, but attention is also given to related health interventions. Part 1 summarizes major findings in terms of seven program approaches: CBD; integrated programs; social marketing; traditional mid-wives; post-partum programs; incentive programs; and programs with a special focus on urban populations." The paper concludes with a section on the lessons learned. Attached is a description of the individual projects, presented on a country by country basis. The findings contained in these country descriptions could be useful resource material for participants designing a project. Trainers could also use any of the sections describing the project approaches as a supplementary reading for course work. PLN-Operations Research.

READ/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Operations Research/ Family Planning Programs/ CBD Programs/ Integrated Programs/ Incentives/ Social Marketing/ Urbanization/ Traditional Birth Attendants/ INT/ AFR/.

197. Schuler, Sidney Ruth, and E. Noel McIntosh, Melvyn C. Goldstein, Bandri Raj Pande. Barriers to Effective Family Planning in Nepal. Studies in Family Planning; Sept/Oct 1985; 16(No. 5): p260-270.

The article reports on a study conducted in Nepal to investigate why family planning services in the capital city were being under utilized. "The findings suggest that the present clinic-based system is not effective for providing family planning services in the urban areas of Nepal." This reflects the "traditional hierarchical" interactions in this specific culture. This could be used as a background reading when discussing access issues as a component of family planning program planning.

PLN- Improving Access to Family Planning.

READ/ FP/ PLN/ PLN-6/ ENG/ Family Planning Programs/ Access/ Clinic Based Delivery Systems/ Program Planning/ User Perspective/ Culture/ NEP/INT/.

198. Sherman, Salomon. Elaboration Des Projets AID; 2 pp. This is a two page summary on preparing projects for USAID. PLN-Proposal Writing.

TOOL/ GNL/ PLN/ PLN-5/ FRE/ Proposal Writing/ INT/.

199. Sherwood, Scott W. (American Society for Training and Development). Organization Development: Present Practice and Future Needs. Washington, D.C.: American Society for Training and Development; 1982; 79 pp.

Note: Conference Proceedings.

STR/PLN-Shelf.

PLN/ ENG/.

200. Simmons, Ruth, James F. Phillips, and Mizanur Rahman. Strengthening Government Health and Family Planning Programs: Findings from an Action Research Project in Rural Bangladesh: 212-221.

This article reports on a study conducted in Bangladesh aimed at improving operations and problem solving capabilities in public sector health and family programs. The background and framework of the project are described, followed by a discussion of the methods and procedures used in conducting the study. The results of the study comprise the bulk of the article.

PLN-Government Sponsored Programs.

READ/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Integrated Programs/ Public Sector Programs/ Operations Research/ Implementation/ Program Planning/ BAN/ INT/.

201. Siy, Robert Y. The Family Planning and Rural Development Associates; 1984; 21; pp.

This case provides an interesting and detailed description of the history and evolution of a very successful and innovative family planning program in Southeast Asia (Thailand). The case is designed to introduce students to the process of goal setting, strategy formulation and implementation. It also emphasizes the competing concerns and trade offs that managers may face in regards to long-term and short-term goals and the economic viability of an organization. The author describes the various programmatic decisions made during the one and a half decades that the organization has provided family planning services.

This includes a description of the various activities that the organization has expanded to include, and how they are administered. In the final pages of the text, the author describes how the director is faced with a pivotal decision to accept donor funds to provide services unrelated to family planning. The reader is then asked to analyze the decisions made and to determine strategies and priorities for the next decade. The case includes a number of organizational diagrams and seven pages of teaching notes which should help trainers when presenting the case. Trainers could readily supplement the teaching notes in order to address additional issues in strategic and program planning. NB: This case is also located in the A.I.M. Casebook.

PLN-Strategic Planning.

CASE/ FP/ PLN/ PLN-1/ PLN-2/ PLN-3/ ENG/ Strategic Planning/ Goal Setting/ Organizational Development/ Marketing/ Competitive Strategy/ CBD Programs/ THA/ INT/.

202. Slevin, Dennis P., and Jeffrey K. Pinto. Balancing Strategy and Tactics in Project Implementation; 8 pp.

"It is the rare project manager who is a brilliant strategist and a skilled tactician, but to manage projects successfully, both capacities must be brought to bear. The authors propose ten critical success factors for projects, break them down into strategic and tactical subgroups, and place that model in a project-life-cycle framework. They discuss what problems are likely to occur in a project if a project is well formulated strategically but mishandled tactically, or well executed but poorly conceived.

PLN-Program Cycle.

READ/ GNL/ PLN/ PLN-1/ ENG/ Strategic Planning/ Operations Planning/ Project Development/ Implementation/ INT/.

203. Smith, Gordon, M.B., Ch.B., M.P.H. under the supervision of Professor Roger L. Nichols, M.D. (Harvard School of Public Health). Fictitia. Boston, Massachusetts: Harvard School of Public Health; 1982; 30 pp. (Case Studies in Health Organization for Developing Countries).

This is a case study of a fictitious developing country. Demographic and health information is provided for the different regions within the country. The reader can use this data as the basis for a planning exercise. Best done in groups, the minimum time required is two hours, but could be extended to allow for a more comprehensive analysis of the data and a more complete exercise in planning.

PLN-Program Cycle.

CASE/ HLTH/ PLN/ PLN-1/ PLN-2/ Pln-5/ PLN-6/ ENG/ Program planning/ Problem identification/ Program cycle/ INT/.

204. Solis, German Retana. Programa de Gerencia Cooperativa (Cooperative Management Program); 21 pp.

A basic article for defining the process of strategic planning. SWAT (FODA) is examined; Strengths, Weaknesses, Opportunities, and Threats are examined. The article assists the reader in planning; suggestions as to establishment of priorities and some basic suggestions for production strategies are given.

PLN - strategic planning.

TOOL/ GEN/ PLN/ PLN - strategic planning/ SPA/ INT/.

205. Soriano, Emily P., under supervision of Peter D. Garrucho, Jr. Commission of Population: Regional Population Program (A). Manila, Philippines: Asian Institute of Management; 1976; 30 pp.

Note This case is contained in the AIM Casebook which contains other cases on the Philippines Family Planning Program. Set in the Philippines, this case focuses on the complex problems facing the Regional Population officer responsible for coordinating population activities. The program was decentralized several years earlier and the Regional officer is responsible for overseeing fifteen public and private organizations involved in population activities. The officer is frustrated because he feels that the regional directors of the

participating agencies lack involvement in the planning and management of activities at the regional level. To address the problem, the Regional officer is trying to determine exactly what he wants the agencies to do and what his next step should be. Attached are organizational charts, a summary of the role of each participating agency, data on targets and acceptor performance, and budget information. Trainers could use this as the basis for an extended workshop or course on strategic and operations planning and organizational design and diagnosis. NB - There is a complimentary case on the Philippines by the same author. PLN-Shelf.

CASE/ FP/ PLN/ PLN-5/ ENG/ Program Planning/ Family Planning Programs/ Public Sector Programs/ Private Sector Programs/ Implementation/ Coordination/ PHI/ INT/.

206. Soriano, Emily P., under supervision of Peter D. Garrucho Jr. Commission of Population: Regional Population Office (B). Manila, Philippines: Asian Institute of Management; 1976; 25 pp. Note: This case is contained in the AIM Casebook which contains other cases on the Philippine Family Planning Program. In this case a Regional Population Officer in the Philippines is assessing the performance and the direction of the programs he is responsible for. A description is provided for each of the operational activities of the population office, detailing some of the current initiatives and some of the barriers affecting successful implementation of activities. The barriers identified include inadequate manpower and workspace, and difficulties in coordinating the efforts of the cooperating agencies participating in family planning activities. The Regional Officer feels that in spite of these problems, staff morale and motivation were still high. In assessing the situation, the Regional Officer is trying to determine if the activities of the Regional Population Office are contributing effectively to achieving the population objectives for the region and if he had defined the key tasks for accomplishing his Regional Population Office objectives. This case also touches on organizational design and participative management techniques. The case is supplemented by extensive data including: organizational charts; budgets; job descriptions; and data flow sheets. Trainers could use this case to illustrate how the lack of some elements of strategic planning can hinder operational activities. NB: There is a complementary case entitled, "Commission on Population: Regional Population Program (A)", by the same author. PLN-Shelf.

CASE/ FP/ HRM/ PLN/ HRM-1/ HRM-4/ PLN-2/ PLN-3/ PLN-4/ PLN-5/ ENG/ Manpower Planning/ Organizational Design/ Strategic Planning/ Participative Management/ PHI/ INT/.

FPMT LIBRARY - LOGISTICS

1. Alan Guttmacher Institute. International Family Planning Perspectives; 1986-.

Published quarterly by the Alan Guttmacher Institute, this journal contains articles and special reports on international family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

2. Anonymous (Harvard School of Public Health). The Aga Khan Health Services: Monitoring Lady Health Visitors in Pakistan. Boston, MA: HSPH; April 26, 1985; 27 pp.

This case describes the rural health system in Pakistan detailing the organizational structure, and the systems for monitoring, supervision and logistics. Due to continuing expansion and heavy utilization, the current monitoring and evaluation system doesn't adequately serve the needs of management or the Lady Health Visitors who deliver the bulk of health services and is asked to address the following: 1) What are the objectives of the central health board of Pakistan for the monitoring and evaluation system, both internally and with organizations outside Pakistan?; 2) What are the major problems with the current non-clinical reporting system?; 3) What changes would you recommend to the monitoring evaluation system?; 4) How would you revise the monthly activity report of the LHV?; and 5) What are the benefits and resources required for this proposed system? Included are copies of: organizational charts; forms used at clinic level to record patient information; and monthly and annual activity reports submitted by personnel at the different levels of the system. The responses to the questions could be prepared individually or by small groups and then presented for discussion.

M&E- Management Control Systems.

CASE/ HLTH/ M&E/ HRM/ LOG/ M&E-3/ M&E-4/ M&E-5/ ENG/

Organizational Design/ Supervision/ Logistics/ Data Sources and Collection Methods/ Evaluation/ PAK/ INT/.

3. Anonymous. El Libertador: Health Care Delivery In A Caracas Barrio. Tunis; May 15-17, 1984; 17 pp.

This two part case is a discussion of various aspects of a health service post in a poor urban settlement in Venezuela. The first part of the case focuses on the implications for the health post of a structural reorganization and decentralization of the Health Ministry. Background information is provided and the reader is asked to analyze the reorganization, and to make recommendations as to how the limitations might be overcome. The reader is asked to assess the decentralization in terms of such variables as: personnel training; anatomy; information; patient relations; and service coverage; In the second part of the case, the analysis focuses on logistics support from the Ministry of Health. The reader is then asked to determine what institutional changes

could be made and how human resources could be utilized to overcome organizational deficiencies. The analysis could be the basis for classroom discussion or the basis for a written assignment.

Hrm-Organizational Development.

CASE/ HLTH/ HRM/ LOG/ HRM-10/ LOG-1/ Organizational Development/ Logistics Cycle/ INT/.

4. Arias, Maria Eugenia. Honduras Case 1: A Shortage of Supplies. Boston: Management Sciences for Health; September 1986.

Note: This case is currently in draft form.

This complex case describes the logistics problems in the Honduran family planning program. Detailed information on the history and organization of the program provides the reader with data to analyze the problems of contraceptive distribution at different levels. The findings of a consultant brought in to study the problem are included in the body of the case. The reader is asked to assume the role of the head of the MCH division at the Ministry of Health and determine how to resolve the problems occurring throughout the program.

LOG-Logistic Management.

CASE/ FP/ LOG/ LOG-1/ LOG-2/ LOG-5/ LOG-6/ LOG-7/ LOG-8/ ENG/ Logistics cycle/ Procurement/ Inventory management/ HON/ INT/.

5. Centers for Disease Control. Logistics Guidelines for Family Planning Programs. Atlanta, GA: Centers for Disease Control: Center for Health Promotion and Education: Division of Reproductive Health; 1987; 72 pp.

This manual is written for family planning program managers in developing countries. It contains guidelines for those individuals who are responsible for "procuring family planning supplies and ensuring that they reach their ultimate destination." Divided into five sections, the manual addresses the following topics: the definition of logistics; logistics system management; evaluation of the logistics system; Supply Data Analysis; and forecasting. The manual also contains sample forms and checklist for use in logistics management. This manual could serve as a resource for participation in a course on family planning logistics.

LOG-Shelf.

MANUAL/ TOOL/ FP/ LOG/ LOG-/ ENG/ FRE/ Logistics cycle/ Forecasting/ Procurement/ Inventory management/ Storage/ Transport/ Contraceptive/ INT/ BB.

6. Family Planning International Assistance (The International Division of Planned Parenthood Federation of America, Inc.). Commodity Procedures and Guidelines. New York, NY: Family Planning International Assistance; November 1981.

LOG-Shelf.

LOG/ ENG/ INT/.

7. (Alan Guttmacher Institute). Family Planning Perspectives; 1986-.

Published bimonthly by the Alan Guttmacher Institute, this journal contains articles and special reports on domestic family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

8. Garrucho, Peter D. Commission on Population: Logistics Division. Manila, Philippines: Asian Institute of Management; 1974; 24 pp.

Note: This case is contained in the AIM Casebook which contains other cases on the Philippine Family Planning Program.

This case details the issues confronting the Associate Director of Logistics for the Population Commission of the Philippines. The current logistics cycle is described including procurement, inventory management, transportation, forecasting, and policy issues on specific contraceptive supplies. The Associate Director wants to alter the system to work more effectively. He discusses the problems the program is experiencing with a colleague and outlines some of the possible changes that could be implemented to remedy the problems. Trainers could use this as the basis for a classroom discussion addressing the entire logistic cycle or focusing on specific aspects of the cycle.

PLN-Shelf.

CASE/ FP/ LOG/ LOG-1/ LOG-2/ LOG-4/ LOG-5/ ENG/ Logistics Cycle/ Forecasting/ Procurement/ Inventory Management/ Transport/ Pharmaceutical Policy/ Contraceptive Supplies/ Oral Contraceptives/ PHI/ INT/.

9. Huber, Sallie Craig (FPMT). Commodity Calculator Exercise. Boston, Massachusetts: Management Sciences for Health; 1987; 1 pp.

This exercise provides practice in the use of a calculator and also allows the participant to practice skills in monitoring stock forms. This exercise requires two hours.

LOG-Inventory Management.

EXER/ FP/ LOG/ LOG-5/ ENG/ Inventory management/ Contraceptive supplies/ NIG/ INT/.

10. Ickis, John C. The Quarterly Count: Administrative Supervision in Community Distribution Program. Boston, MA: FPMT; 1987; 6 pp.

Using a contraceptive community distribution program in Latin America as the basis for this case, the author examines the multiple facets of data collection. On a quarterly visit to a distributor in the program, the promoter discovers some discrepancies in the data collected during the previous quarter. Issues raised by the case include: the role of the supervisor in data collection; inventory control; user follow-up; and, data collection forms. Trainers could discuss how reporting can be used as a supervision tool as well as the techniques used for data collection and reporting.

MIS-Data Collection.

CASE/ FP/ MIS/ HRM/ LOG/ MIS-6/ LOG-5/ HRM-9/ ENG/ Supervision/
Inventory Management/ Data Collection/ Records/ Client Records/
Inventory Reccrds/ LAA/ INT/.

11. Kalaule, Ezekiel B., Jane Kwawu, Hammouda Bellamine (Centre for African Family Studies (CAFS)). Report on the First Anglophone Course in Management of Family Planning Programmes. 1 ed.: Centre for African Family Studies (CAFS); May 28, 1986; 91 pp.

These two volumes report on a course in Family Planning program management given at the Centre for African Studies. The course was designed to improve the efficiency and effectiveness of family planning program managers in planning, implementing and evaluating programs. The first volume is a detailed report on the planning of the course. The second volume reports on the specifics of the course. The contents include: the course goals and objectives; course content; a time table; training and learning techniques; the organization of the course; a case study integral to the course; an evaluation; and an analysis and a summary of recommendations. The content of the course has units on the following; an analysis of the environment in which family planning programs are planned and operated in Africa; different approaches to service delivery; the management process; program planning; program implementation; personnel issues; management of equipment, supplies; aspects of financial management; program evaluation; field work; and project writing.

HRM-Shelf.

COURSE/ FP/ HRM/ HRM-1/ PLN/ LOG/ FIN/ FIN-1/ LOG-1/ POL-3/ ENG/
Policy environment/ Family planning programs/ Program cycle/
Program planning/ Fiscal techniques/ Management functions/
Logistics cycle/ INT/ AFR/.

12. Management Sciences for Health. Logistics Management Training Course.

LOG-Shelf.

LOG/ ENG/ INT/.

13. Management Science for Health. Managing Drug Supply/ Bien Gerer les Medicaments/El Suministro de Medicamentos. Boston, Massachusetts: Management Sciences for Health; 592 pp.

Note: free of charge.

Designed to serve as a comprehensive manual on drug supply, this was written to provide explanations of fundamental supply concepts, definitions of basic terms, and practical ideas for designing and implementing changes in drug supply. The manual is divided into sections that address the following topics: 1. selection, including what to buy and how much; 2. procurement, including how to buy, whom to buy from, quality assurance, financing options, and local production opportunities; 3. distribution, including inventory control, importation and port-clearing, design and operation of storage facilities and delivery strategies; 4. use, including promoting rational drug

prescribing, establishing good dispensing practices, and encouraging appropriate use by patients; and 5. managing the system, including organizing drug supply, reducing costs, security, and designing training programs to improve logistics. To make the manual accessible to those seeking guidance in specific areas, the authors have incorporated some useful features. First, the manual contains a problem index arranged by common drug supply problems and containing references to where they are addressed in the text. Many chapters begin with assessment guides, which are questions intended to help the reader understand his specific supply system. Each chapter contains a one page summary which can be used to gain a rapid overview of all aspects of drug supply. Throughout the text, there are also single page country summaries which serve to illustrate points in the text. Also included are: chapter appendices; sample forms; reference lists and a glossary of terms. This manual can serve as a resource on drug supply issues and can be used by trainers in preparing course modules on the topic.

LOG-Shelf.

READ/ MAN/ EXER/ TOOL/ HLTH/ LOG/ LOG-1/ LOG-2/ LOG-4/ LOG-5/
LOG-6/ LOG-7/ LOG-8/ ENG/ FRE/ SPA/ Logistics cycle/ Procurement/
Drug Procurement financing/ Inventory management/ storage/
Transport/ Pharmaceutical policy/ Import regulations/ Prescripion
regulations/ Local manufacture/ BB/ INT/.

14. McMahon, Rosemary, Elizabeth Barton, Maurice Piot. On Being In Charge: A Guide for Middle-Level Management in Primary Health Care (Si Vous Etes Chargez De...). 2 ed. Switerland: World Health Organization; 1984; 366 pp.

This comprehensive guide book incorporates narrative and exercises designed to help middle level health care managers improve their skills. It is written in such a way that the reader can select a relevant section of the book and read it without reading the information that precedes or follows it. The book is arranged in four parts. Part I explains in simple terms the general principles of management as a system of thought, and the functions of mangement. Part II is concerned with personnel relations: how to encourage and coordinate a health team, to communicate with groups of people and to supervise in a supportive way. Part III presents methods for the management of equipment and drugs and the functioning of a health center. Part IV deals with how to apply principles, methods, and management skills to the planning, implementation and evaluation of an area health service. Each part has several chapters and each chapter begins with a statement of learning objectives. Exercises related to specific chapters are located in the book. Trainers could use this book for background readings, exercises, or to aid them in designing course components.

HRM-Shelf.

READ/ MANUAL/ EXER/ HLTH/ PLN/ LOG/ MIS/ M&E/ HRM/ HRM-1/ HRM-9/
ENG/ FRE/ Management General/ Management Functions/ Management
of Groups/ Interpersonal Communications/ Management Style/

Supervision/ Planning/ Implementation/ Inventory Management/
Procurement/ Evaluation/ Program Evaluation/ Needs Assessment/
MBOR/ Situational Analysis/ Mission Statement and Objective/ Data
Sources and Collection Methods/ Program Monitoring Systems/ BB/
INT/.

15. The Medex Group (University of Hawaii). The Medex Primary Health Care Series. Honolulu, HI: The Medex Group; 35 Vol. The thirty five volumes in this series comprise a compendium of field-tested primary health care methods and materials. Using modules, manuals, and workbooks, "the Series stresses the training of middle level health personnel as trainers and supervisors as well as providers of health services. The series also places importance on community health workers and on strengthening the associated management systems needed to support the effective delivery of primary health care services at the local level.".

Shelf.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

16. Medex Primary Health Care Series. Management Training Manuals and Workbooks. Honolulu, Hawaii: University of Hawaii, John A. Burns School of Medicine; 1983.

REF-SHELF.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

17. The Population Council. Studies in Family Planning; 1979-. The FPMT library contains issues of the bimonthly journal Studies in Family Planning, dating from 1979. An annual index lists articles published each year by author, subject and geographic area. The subject and geographic indexes list articles alphabetically by title. Studies in Family Planning is an international journal that addresses family planning and related health and development issues, with emphasis on activities in developing countries.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS M&E/ FIN/ IE&C/ INT/.

18. Wolff, James, Robert A. Cushman, C. Elizabeth McGrory, Florida Kweekah. Beyond The Clinic Walls: Cases Studies in Community-Based Distribution. C. Elizabeth McGrory ed. Boston, Massachusetts: Family Planning Management Training Project; 1989; 92 pp. (Linda Suttentfield).

Note: This case book is one in a series of four handbooks for managers of family planning programs.

Beyond the Clinic Walls contains a series of case studies which depict the management issues a family planning organization faces in designing and implementing a new community-based distribution program. Divided into four parts, the book includes sections on: planning; management information systems; supervision; and compensation of workers and the pricing of contraceptives. Each section begins with a discussion of the major management issues which the case(s) in that section address, and an introduction to

the concepts to be used in analyzing the cases. Each case is followed by an analysis which addresses the major themes presented in the case, and by study questions. These analyses should help to stimulate and guide discussion about the cases and questions. The cases book is intended for use in training programs or self-instruction for managers of community-based distribution of family planning services.

TOT-shelf.

CASE/ FP/ HRM/ MIS/ LOG/ ENG/ CBD Programs/ INT/.

FPMT LIBRARY - MANAGEMENT INFORMATION SYSTEMS

1. Alan Guttmacher Institute. International Family Planning Perspectives; 1986-.

Published quarterly by the Alan Guttmacher Institute, this journal contains articles and special reports on international family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

2. Anonymous. Supervision Tool; 3 pp.

This is a sample form used in Senegal to monitor activities at the health post level. It could be used as the basis to construct other supervision tools.

MIS-Supervision.

TOOL/ HLTH/ MIS/ HRM/ M&E/ M&E-3/ MIS-6/ HRM-9/ FRE/ Supervision/ Performance Appraisal/ Program Evaluation/ Program Monitoring Systems/ SEN/ INT/.

3. Anthony, Robert N., and Dearden, John. La Evaluacion del Desempeno (Evaluation of Performance). Illinois: Richard D. Irwin, Inc. Restricted distribution.; 17 pp. (Management Control Systems).

The article deals with various means of evaluation and compares lax administration with rigid.

MIS - performance evaluation.

TOOL/ GEN/ HRM/ MIS - performance evaluation/ SPA/ INT/.

4. Berge, Noel and Marcus Ingle and Marcia Hamilton. Microcomputers In Development : A Manager's Guide. first ed. West

Hartford, CT: Kumarian; Press; c1986; 31 pp; ISBN 0-931816-05-X.

"This guide is written for development personnel responsible for the management of projects or institutions interested in acquiring or expanding their use of microcomputers...The guide includes: an overview of computing equipment and applications; potential applications of microcomputers in the management of development projects and institutions; a description of microcomputer software programs and hardware components; suggestions for assessing the need for a microcomputer including the pros and cons of microcomputers in developing country situations; the strengths and limitations of microcomputers; future trends; and a computer glossary". Seven detailed case histories of the application of microcomputers in managing development projects, are provided to illustrate some of the successes and problems that might be anticipated. Trainers could use this as a comprehensive reference to keep in their library for designing a course or workshop on this subject and to give to participants as a resource for their own libraries.

MIS-Shelf.

MAN/ READ/ CASE/ GNL/ MIS/ MIS-1/ MIS-2/ MIS-3/ MIS-4/ MIS-5/ MIS-6/ Mis-7/ ENG/ Program Monitoring Systems/ THA/ KEN/ LAC/ IND/ PAK/ BB/ INT/.

5. Bicknell, William, M.D., MPH (Boston University School of Public Health). How little Data is Enough. Boston, MA; 1985; 12 pp.

In this exercise, the reader is given background information on the status of health care in Haiti and the current service delivery systems. The reader is asked to function within a team of expert foreign consultants to prepare two data collection tools - one for the dispensary level and one for the agent de sante (community level worker). The exercise should take about ninety minutes to complete and discuss and is an effective way for trainers to emphasize some of the essential information about data collection.

MIS-Data Collection.

EXER/ HLTH/ MIS/ MIS-3/ MIS-4/ ENG/ Program Monitoring Systems/ Clinic Records/ HAI/ INT/.

6. Cosentino, Laercio J. L. dBASE III: Interativo. Sao Paulo: Editora Atlas S.A.; 1987; 207 pp.

This introduction to dBASE III was used by FPMT in an MIS course held in Brazil.

MIS-Paul Auxila.

MANUAL/ GNL/ MIS/ POR/ INT.

7. De Souza Dias, Donaldo. O Sistema De Informacao E A Empresa. Rio de Janeiro: Livros Tecnicos e Cientificos Editora S.A.; 1985; 109 pp.

This book on management information systems has been used by Paul Auxila in FPMT's MIS training workshop in Brazil.

MIS-Paul Auxila.

READ/ GNL/ MIS/ MIS-/ POR/ INT/.

8. Deboeck, Guido and Bill Kinsey. Managing Information for Rural Development: Lessons from Eastern Africa. Washington, D.C.: The World Bank; 1980; 70 pp. (World Bank Staff Working Papers; Number 379).

Summary of discussions and principal conclusions of a Regional workshop on Monitoring and Evaluation of rural development projects in Eastern Africa (1979). Issues raised: Identification of priority users of information; type and frequency of data collection efforts; problems of translating raw data into useful information; location and staffing of M&E units; resource requirements of implementing project information systems; training needs; and effective management of rapidly growing volumes of information on rural development projects. Could be used to prepare short technical note or for case discussion as various references are made to Eastern African rural development projects.

M&E-Shelf.

READ/ GNL/ M&E/ MIS/ M&E-3/ M&E-4/ MIS-3/ MIS-4/ ENG/ Questionnaires/ Demographic Surveys/ Data Collection/ Program Evaluation/ Program Effectiveness/ Program Monitoring Systems/ Project Records/ EAF/ INT/.

9. Department of Health and Human Services. Patient Flow Analysis; September 1986; 26 pp.

This is a comprehensive manual on how to conduct a patient flow analysis for outpatient clinics. It contains detailed instructions on coding data collection and computerizing all the necessary forms. Each of the forms used in this system is also included in the manual.

PLN-Clinic Efficiency.

MAN/ HLTH/ PLN/ PLN- / Data Collection/ MIS/ Program Monitoring System/ CLinic Efficiency/ Patient Flow Analysis/ DOM/.

10. (Alan Guttmacher Institute). Family Planning Perspectives; 1986-.

Published bimonthly by the Alan Guttmacher Institute, this journal contains articles and special reports on domestic family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

11. Herzlinger, Regina. Por Que Fracasan los Sistemas de Informacion en Organizaciones sin Fines de Lucro (Why Information Systems Fall Apart in Organizations with Unlimited Funds). Ecuador: FPMT Project; 1988; 17 pp.

Why money tends to be spent poorly in organizations with too much of it, due to poor utilization of available information.

FIN, MIS.

TOOL/ GEN/ FIN/ MIS/ SPA/.

12. Herzlinger, Regina. Why Data Systems in Nonprofit Organizations Fail. Boston, MA: Harvard Business Review; January-February 1977; 7 pp. (Volume 55; (Number 1)).

This article discusses the needs for nonprofit institutions to have "efficient information and control systems." The author examines the "unbusiness like accounting practices that characterize many government agencies and the seat of the pants managerial style of many private agency executors that result in neglect and poor handling of the in-house information systems." The article concludes with guidelines and solutions for managers wishing to "improve the design, installation, and operation of information systems."

MIS-General.

READ/ GNL/ MIS/ MIS-2/ ENG/ Program Monitoring Systems/ INT/.

13. Ho, Teresa. Managing Health and Family Planning Service Delivery Through A Management Information System. Washington, DC: World Bank Paper; April 1985; PHN Technical Note 85-3; 54 pp. Prepared as a World Bank technical note, "the main sections of the paper include: 1. a discussion of the uses of a management information system, particularly as a tool for management and planning and; 2. guidelines for setting up a management information system for a large scale (national) health delivery system, including: the main elements of an MIS, designing the MIS, and implementing the MIS. All discussions center around the experience of two World Bank projects in India." This chapter is a valuable reference for anyone who is planning to design and implement a management information system for a health or family planning program.

MIS-Shelf.

READ/ HLTH/ FP/ MIS/ ENG/ INT/ BB2.

14. Hoffman, Paul, Tamara Nicoloff. MS-DOS: Guia do Usuario. Sao Paulo: McGraw-Hill; 1987; 232 pp.

A user's guide to the disk operating system (DOS), used in the MIS training workshop held in Brazil.

MIS-Paul Auxila.

MANUAL/ GNL/ MIS/ POR/ INT.

15. Ickis, John C. (INCAE). Community Distribution Reports (A and B). Alajuela, Costa Rica; 1986; A-9, B-12 pp.

In these complementary cases, the focus is on the use of data to evaluate a community based distribution program in Latin America. The project supervisor is "responsible for analyzing the plans and reports submitted by the five community workers who report to her, identifying problems in achieving goals and objectives, and taking the remedial actions she deemed necessary." In Case A the supervisor receives a report from one of the community workers that includes seven tables that summarize the data collected by the worker. Trainers could develop a role play with a dialogue between the supervisor and the community worker on the content of the report and the reporting system. In Case B, the project supervisor wants to use the reports of the evaluation section to determine the successes and problems in the provinces she is responsible for, and to try and assess the relationship between promotional activities and contraceptive sales. The tables and reports prepared by the community worker and the evaluation section, are provided for analysis. Trainers could use this to discuss supervision issues in CBD projects and data collection, including the type of data collected, how it is recorded and reported, and its utility in project evaluation. Participants could be asked to prepare a written analysis of the data contained in Case B or to participate in a classroom discussion.

MIS-CBD Records.

CASE/ FP/ PLN/ HRM/ MIS/ HRM-9/ MIS-6/ MIS-2/ ENG/ Supervision/ Logistics/CBD Programs/ Program Monitoring Systems/ Implementation/ Objective Setting/ LAA/ INT/.

16. Ickis, John C. Los Informes de Distribucion Comunitaria (Community Distribution Reports): INCAE; 1986; 20 pp.

The case study deals with a young woman who is made supervisor of a program to distribute contraceptives and must struggle with inadequate information.

MIS - information.

CASE/ FP/ GEN/ MIS/ information/ SPA/ INT/.

17. Ickis, John C. The Quarterly Count: Administrative Supervision in Community Distribution Program. Boston, MA: FPMT; 1987; 6 pp.

Using a contraceptive community distribution program in Latin America as the basis for this case, the author examines the multiple facets of data collection. On a quarterly visit to a distributor in the program, the promoter discovers some discrepancies in the data collected during the previous quarter. Issues raised by the case include: the role of the supervisor in data collection; inventory control; user follow-up; and, data collection forms. Trainers could discuss how reporting can be used as a supervision tool as well as the techniques used for data collection and reporting.

MIS-Data Collection.

CASE/ FP/ MIS/ HRM/ LOG/ MIS-6/ LOG-5/ HRM-9/ ENG/ Supervision/ Inventory Management/ Data Collection/ Records/ Client Records/ Inventory Records/ LAA/ INT/.

18. The John Snow Public Health Group (JSI). Indicator Medical Standards for Family Planning Audit and Self-Evaluation. Boston, MA: JSI; 1983; 23 pp.

This is a package of "checklists" that can be used for periodic monitoring and evaluation of family planning programs. The package includes a checklist to assess each of the following: entry interview with staff; equipment supplies; clinic environment and flow; follow-up and recording policies; laboratory procedures; counseling and education; physical exam; IUD insertions; diaphragm fittings; chart review; debriefing interview with staff; and client satisfaction and understanding survey.

M&E-Quality Control.

TOOL/ FP/ M&E/ MIS/ M&E-5/ ENG/ Program Monitoring Systems/ INT/.

19. Korten, Francis F. A Statistical Report for Dr. Vivas. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1976; c1977: p131 - p156; 26 pp.

Note: This case is the sixth of twelve located in the Casebook For Family Planning Management.

This case uses information and data collected by seven family planning clinics to illustrate the importance of presenting data in a usable format. The head of a family planning program in Latin America "has just received his first quarterly report under a new system and is frustrated by his inability to determine from the data how well each clinic is functioning or what might be done to improve performance." The reader is asked to take the

data presented and to rearrange the tables in such a way that clinic performance will be more clear, and to indicate for each clinic the types of follow-up action the program head can take in order to improve performance. Trainers can use this case as the basis for a comprehensive exercise combining the design of data reporting systems and how to effectively use the information contained as a management tool. NB: This case follows another case exploring the role of performance indicators in evaluating clinic effectiveness entitled, "Moraza and Izaltenango". The cases can be used in conjunction with one another.

HRM-Shelf.

CASE/ EXER/ FP/ MIS/ M&E/ M&E-4/ MIS-6/ ENG/ SPA/ Program Effectiveness/ Program Monitoring Systems/ Program Evaluation/ LAC/ INT/.

20. Kumar, Krishna (Bureau for Program and Policy Coordination, A.I.D.). Conducting Group Interviews in Developing Countries: A.I.D. Program Design and Evaluation Methodology Report No. 8. Washington, D.C.: Agency for International Development; April 1987; 44 pp.

PLN-Shelf.

PLN/ M&E/ MIS/ Data Collection/ Needs Assessment/ IEC/ Focus Groups/ ENG.

21. Laing, John. Demographic Evaluation of Family Planning Programs: Development Studies Centre; Demography Teaching Notes 4; 156 pp.

Quite technical manual on how to calculate the effect of family planning use on fertility. Contains complex calculations and references to existing computer programs. Explains the various terms used in demographic research. Many definitions and short reviews of program evaluation and management information systems that can easily be converted in one or two page handouts.

M&E-Shelf.

READ/ Teaching Notes/ FP/ M&E/ M&E-2/ MIS/ MIS-1/ MIS-5/ MIS-6/ ENG/ Questionnaires/ Incomplete Reporting/ Demographic Methods/ KAP Surveys/ Data Collection/ Program Evaluation/ Quantitative Evaluation/ Births Averted/ Birth Rate/ CYP Records/ Clinic Records/ Client Records/ Program Monitoring Systems/ INT/.

22. Materia Politica Empresarial (Business Policy Material; 10 pp.

Dealing with incomplete and contradictory information in less developed countries.

POL, PLN, MIS.

TOOL/ GEN/ PLN/ POL/ MIS/ SPA/ INT/.

23. Mayo-Smith, Ian and Nancy Ruther. Managing Information - International Case Studies. West Hartford, Connecticut: Kumarian Press, Inc.; 1987; 54 pp.

Note: This casebook comes with a 10 page companion workbook entitled, "Notes for Case Leaders," which "provides trainers with suggestions and ideas for use of the cases".

This is a casebook containing five different cases "intended to be used in a classroom setting to stimulate discussion of important issues in information management or to form the basis for practical exercises. The separate "Notes for Case Leaders" suggest some ways in which the cases can be used and give some pointers as to the issues to be considered."

MIS-Shelf.

CASE/ EXER/ GNL/ MIS/ ENG/ INT/ BB2.

24. McMahon, Rosemary, Elizabeth Barton, Maurice Piot. On Being In Charge: A Guide for Middle-Level Management in Primary Health Care (Si Vous Etes Chargez De...). 2 ed. Switerland: World Health Organization; 1984; 366 pp.

This comprehensive guide book incorporates narrative and exercises designed to help middle level health care managers improve their skills. It is written in such a way that the reader can select a relevant section of the book and read it without reading the information that precedes or follows it. The book is arranged in four parts. Part I explains in simple terms the general principles of management as a system of thought, and the functions of mangement. Part II is concerned with personnel relations: how to encourage and coordinate a health team, to communicate with groups of people and to supervise in a supportive way. Part III presents methods for the management of equipment and drugs and the functioning of a health center. Part IV deals with how to apply principles, methods, and management skills to the planning, implementation and evaluation of an area health service. Each part has several chapters and each chapter begins with a statement of learning objectives. Exercises related to specific chapters are located in the book. Trainers could use this book for background readings, exercises, or to aid them in designing course components.

HRM-Shelf.

READ/ MANUAL/ EXER/ HLTH/ PLN/ LOG/ MIS/ M&E/ HRM/ HRM-1/ HRM-9/
ENG/ FRE/ Management General/ Management Functions/ Management
of Groups/ Interpersonal Communications/ Management Style/
Supervision/ Planning/ Implementation/ Inventory Management/
Procurement/ Evaluation/ Program Evaluation/ Needs Assesssment/
MBOR/ Situational Analysis/ Mission Statement and Objective/ Data
Sources and Collection Methods/ Program Monitoring Systems/ BB/
INT/.

25. The Medex Group (University of Hawaii). The Medex Primary Health Care Series. Honolulu, HI: The Medex Group; 35 Vol. The thirty five volumes in this series comprise a compendium of field-tested primary health care methods and materials. Using modules, manuals, and workbooks, "the Series stresses the training of middle level health personnel as trainers and supervisors as well as providers of health services. The series also places importance on community health workers and on strengthening the associated management systems needed to support the effective delivery of primary health care services at the local level."

Shelf.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

26. Medex Primary Health Care Series. Management Training Manuals and Workbooks. Honolulu, Hawaii: University of Hawaii, John A. Burns School of Medicine; 1983.

REF-SHELF.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

27. Murthy, Nirmala and JK Satia. Experiments in Management Development: Experience of India Population Project-1 (A Monitoring System for Primary Health Centre). Nirmala Murthy ed. Ahmedabad, India: India Institute of Management; January 1981; 29 pp.

This monograph reports on a pilot project conducted in India where a monitoring system was introduced in the primary health centers in six districts. Background information is provided on the rural health system and on the monitoring system that was implemented at the health center level. After two and a half years in operation, the system was evaluated for its objectives and utility as seen by those using it. The findings of the evaluation are reported, including a discussion on management information systems. Sample data collection forms are included as report appendices.

M&E-Management Control Systems.

READ/ HLTH/ M&E/ MIS/ M&E-3/ M&E-5/ M&E-6/ ENG/ Program evaluation/ Evaluation/ Program monitoring systems/ IDI/ INT/.

28. National Council for International Health. Management Issues in Health Programs in the Developing World. Washington, D.C.: NCIH; May 1986; 387 pp.

HRM-Shelf.

HRM/ PLN/ POL/ MIS/ ENG/.

29. Patient Flow Analysis in General Outpatient Clinics: Instructions for Collecting Data. Family Planning PFA Manual prepared by Centers for Disease Control and Oklahoma State Department of Health. Atlanta, Georgia: ~~Department of Health and Human Services~~ Public Health Service; September 1986; 26 pp.

Note: 3 copies.

This is a comprehensive manual on how to conduct a patient flow analysis for outpatient clinics. It contains detailed instructions on coding data collection and completing necessary forms. Each of the forms used in this system is also included in the manual.

PLN-Clinic Efficiency.

MAN/ HLTH/ PLN/ PLN-6/ Data Collection/ MIS/ Program Monitoring Systems/ Clinic Efficiency/ Patient Flow Analysis/ DOM/.

30. Paul, Philip F. (Boston University School of Public Health). Introduction to Microcomputers. Boston, MA: B. U. School of Public Health; 1985; 130 pp.

Written as a supplement to a course on microcomputers, this manual introduces computer technology to someone without any prior knowledge. Included is information on hardware and software, computer applications in medical care and information of basic usage. These sections are followed by an introduction to the use of Lotus 1,2,3.

MIS-Shelf.

MAN/ HLTH/ MIS/ MIS-5/ ENG/ INT/.

31. The Population Council. Studies in Family Planning; 1979-. The FPMT library contains issues of the bimonthly journal Studies in Family Planning, dating from 1979. An annual index lists articles published each year by author, subject and geographic area. The subject and geographic indexes list articles alphabetically by title. Studies in Family Planning is an international journal that addresses family planning and related health and development issues, with emphasis on activities in developing countries.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS M&E/ FIN/ IE&C/ INT/.

32. Powell, Victor. Improving Public Enterprise Performance: Concepts and Techniques [Management Development Series No. 22]. Geneva: International Labour Office; c1987; 226 pp; ISBN 92-2-105563-9.

STR/PLN-Shelf.

PLN/ M&E/ MIS/ Strategic Planning/ ENG/ INT/.

33. Robinett, Donna (Family Planning Division). Clinic Monitoring: Pathfinder Fund; February 22, 1985; 6 pp. This is a draft of a checklist for family planning clinical monitoring. "It was originally intended as a trouble shooting guide for supervisors in charge of several clinics, but it could be used by a project manager to analyze a particular clinic." M&E-Quality Control.
TOOL/ FP/ M&E/ MIS/ ENG/ Program Monitoring Systems/ Program Evaluation/ INT/.
34. Silvo, Franco. PROPLAF Case. Boston, Massachusetts: Family Planning Management Training Project; March, 1987; Regional Training Institute report, March 1987; 10 pp. Note: This is a series of Overheads. This is a general Family Planning Management case used as an actual case in FPMT's training of trainers workshop to demonstrate how to use a case method. This is a complete set of overheads providing all the information needed to present the case. There are no teaching notes.
HRM-General Management.
CASE/ FP/ HRM/ MIS/ ENG/ Management/ Management information systems/ Organizational design/ INT/.
35. Vernon, Ken (editor). Library and Information Services of Management Development Institutions -A Practical Guide. Geneva, Switzerland: International Labour Organization; 1986; 122 pp. (Management Development Series; No. 24). "This practical guide ... addresses the needs of small libraries and information services of management institutions... It offers advice on information strategies; the selection and acquisition of various sources of data; planning, budgeting and control; the physical arrangement of materials; services to readers; and the application of computer systems."
Shelf-Ref.
READ/ GNL/ MIS/ MIS-4/ ENG/ INT/ BB2/ RTI.
36. Williams, Andrew T. LOTUS 1-2-3: com ligacoes para o Symphony. Rio de Janeiro: Livros Tecnicos e Cientificos Editora S. A.; 1986; 306 pp. A Lotus 1-2-3 manual used by FPMT in its MIS course taught in Brazil.
MIS-Paul Auxila.
MANUAL/ GNL/ MIS/ POR/ INT/.

37. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Dealing with Data. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

In this case, an Evaluation Officer for the family planning program finds himself responsible for developing an ongoing management information system, as well as coordinating with other agencies interested in population policy and providing support to policy decision making. In addition, the Evaluation Officer has been asked to prepare the MIS component of an urban based community distribution program. Given information on the current systems, the reader is asked to identify the advantages and disadvantages of the present system and to define the information that should be included in the reporting system and how it should be used. The teaching objectives for this case include: identifying the organizational problems in the evaluation department that have contributed to the current situation; understanding how to analyze an existing information system; and identifying the information essential to managers of the different levels of the urban based CBD program, and to understand how this information can be used to improve program management. N.B. This is one of nine cases by the same authors, that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ MIS/ M&E/ MIS-8/ M&E-1/ M&E-2/ M&E-3/ ENG/ Program evaluation/ Program monitoring systems/ Program effectiveness/ INT/.

38. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Mr. Krumah's Dilemma. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

Data collection is the topic of this case. A supervisor from a community based distribution project is having a monthly meeting with one of the distributors and learns that the distributor has developed his own system for gathering and recording data from his visits. The reader is asked to assess why this has happened and to determine what data is really important to both the distributor and the supervisor. The case teaching objectives include: understanding how the distributor uses information to conduct his business; and how the design of a form affects information use. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ MIS/ MIS-3/ MIS-4/ MIS-6/ ENG/ Program monitoring systems/ Data collection/ Records/ INT/.

39. Wolff, James, Robert A. Cushman, C. Elizabeth McGrory, Florida Kweekah. Beyond The Clinic Walls: Cases Studies in Community-Based Distribution. C. Elizabeth McGrory ed. Boston, Massachusetts: Family Planning Management Training Project; 1989; 92 pp. (Linda Suttentfield).

Note: This case book is one in a series of four handbooks for managers of family planning programs.

Beyond the Clinic Walls contains a series of case studies which depict the management issues a family planning organization faces in designing and implementing a new community-based distribution program. Divided into four parts, the book includes sections on: planning; management information systems; supervision; and compensation of workers and the pricing of contraceptives. Each section begins with a discussion of the major management issues which the case(s) in that section address, and an introduction to the concepts to be used in analyzing the cases. Each case is followed by an analysis which addresses the major themes presented in the case, and by study questions. These analyses should help to stimulate and guide discussion about the cases and questions. The cases book is intended for use in training programs or self-instruction for managers of community-based distribution of family planning services.

TOT-shelf.

CASE/ FP/ HRM/ MIS/ LOG/ ENG/ CBD Programs/ INT/.

FPMT LIBRARY - MONITORING AND EVALUATION

1. Alan Guttmacher Institute. International Family Planning Perspectives; 1986-.

Published quarterly by the Alan Guttmacher Institute, this journal contains articles and special reports on international family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

2. Anonymous. Supervision Tool; 3 pp.

This is a sample form used in Senegal to monitor activities at the health post level. It could be used as the basis to construct other supervision tools.

MIS-Supervision.

TOOL/ HLTH/ MIS/ HRM/ M&E/ M&E-3/ MIS-6/ HRM-9/ FRE/ Supervision/ Performance Appraisal/ Program Evaluation/ Program Monitoring Systems/ SEN/ INT/.

3. Deboeck, Guido and Bill Kinsey. Managing Information for Rural Development: Lessons from Eastern Africa. Washington, D.C.: The World Bank; 1980; 70 pp. (World Bank Staff Working Papers; Number 379).

Summary of discussions and principal conclusions of a Regional workshop on Monitoring and Evaluation of rural development projects in Eastern Africa (1979). Issues raised: Identification of priority users of information; type and frequency of data collection efforts; problems of translating raw data into useful information; location and staffing of M&E units; resource requirements of implementing project information systems; training needs; and effective management of rapidly growing volumes of information on rural development projects. Could be used to prepare short technical note or for case discussion as various references are made to Eastern African rural development projects.

M&E-Shelf.

READ/ GNL/ M&E/ MIS/ M&E-3/ M&E-4/ MIS-3/ MIS-4/ ENG/ Questionnaires/ Demographic Surveys/ Data Collection/ Program Evaluation/ Program Effectiveness/ Program Monitoring Systems/ Project Records/ EAF/ INT/.

4. (Alan Guttmacher Institute). Family Planning Perspectives; 1986-.

Published bimonthly by the Alan Guttmacher Institute, this journal contains articles and special reports on domestic family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

5. The John Snow Public Health Group (JSI). Indicator Medical Standards for Family Planning Audit and Self-Evaluation. Boston, MA: JSI; 1983; 23 pp.

This is a package of "checklists" that can be used for periodic monitoring and evaluation of family planning programs. The package includes a checklist to assess each of the following: entry interview with staff; equipment supplies; clinic environment and flow; follow-up and recording policies; laboratory procedures; counseling and education; physical exam; IUD insertions; diaphragm fittings; chart review; debriefing interview with staff; and client satisfaction and understanding survey.

M&E-Quality Control.

TOOL/ FP/ M&E/ MIS/ M&E-5/ ENG/ Program Monitoring Systems/ INT/.

6. Korten, Francis F. A Statistical Report for Dr. Vivas. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1976; c1977: p131 - p156; 26 pp.

Note: This case is the sixth of twelve located in the Casebook For Family Planning Management.

This case uses information and data collected by seven family planning clinics to illustrate the importance of presenting data in a usable format. The head of a family planning program in Latin America "has just received his first quarterly report under a new system and is frustrated by his inability to determine from the data how well each clinic is functioning or what might be done to improve performance." The reader is asked to take the data presented and to rearrange the tables in such a way that clinic performance will be more clear, and to indicate for each clinic the types of follow-up action the program head can take in order to improve performance. Trainers can use this case as the basis for a comprehensive exercise combining the design of data reporting systems and how to effectively use the information contained as a management tool. NB: This case follows another case exploring the role of performance indicators in evaluating clinic effectiveness entitled, "Moraza and Izaltenango". The cases can be used in conjunction with one another.

HRM-Shelf.

CASE/ EXER/ FP/ MIS/ M&E/ M&E-4/ MIS-6/ ENG/ SPA/ Program Effectiveness/ Program Monitoring Systems/ Program Evaluation/ LAC/ INT/.

7. Kumar, Krishna (Burea for Program and Policy Coordination, A.I.D.). Conducting Group Interviews in Developing Countries: A.I.D. Program Design and Evaluation Methodology Report No. 8. Washington, D.C.: Agency for International Development; April 1987; 44 pp.

PLN-Shelf.

PLN/ M&E/ MIS/ Data Collection/ Needs Assessment/ IEC/ Focus Groups/ ENG.

8. Laing, John. Demographic Evaluation of Family Planning Programs: Development Studies Centre; Demography Teaching Notes 4; 156 pp.

Quite technical manual on how to calculate the effect of family planning use on fertility. Contains complex calculations and references to existing computer programs. Explains the various terms used in demographic research. Many definitions and short reviews of program evaluation and management information systems that can easily be converted in one or two page handouts.

M&E-Shelf.

READ/ Teaching Notes/ FP/ M&E/ M&E-2/ MIS/ MIS-1/ MIS-5/ MIS-6/ ENG/ Questionnaires/ Incomplete Reporting/ Demographic Methods/ KAP Surveys/ Data Collection/ Program Evaluation/ Quantitative Evaluation/ Births Averted/ Birth Rate/ CYP Records/ Clinic Records/ Client Records/ Program Monitoring Systems/ INT/.

9. McMahon, Rosemary, Elizabeth Barton, Maurice Piot. On Being In Charge: A Guide for Middle-Level Management in Primary Health Care (Si Vous Etes Chargez De...). 2 ed. Switerland: World Health Organization; 1984; 366 pp.

This comprehensive guide book incorporates narrative and exercises designed to help middle level health care managers improve their skills. It is written in such a way that the reader can select a relevant section of the book and read it without reading the information that precedes or follows it. The book is arranged in four parts. Part I explains in simple terms the general principles of management as a system of thought, and the functions of mangement. Part II is concerned with personnel relations: how to encourage and coordinate a health team, to communicate with groups of people and to supervise in a supportive way. Part III presents methods for the management of equipment and drugs and the functioning of a health center. Part IV deals with how to apply principles, methods, and management skills to the planning, implementation and evaluation of an area health service. Each part has several chapters and each chapter begins with a statement of learning objectives. Exercises related to specific chapters are located in the book. Trainers could use this book for background readings, exercises, or to aid them in designing course components.

HRM-Shelf.

READ/ MANUAL/ EXER/ HLTH/ PLN/ LOG/ MIS/ M&E/ HRM/ HRM-1/ HRM-9/ ENG/ FRE/ Management General/ Management Functions/ Management of Groups/ Interpersonal Communications/ Management Style/ Supervision/ Planning/ Implementation/ Inventory Management/ Procurement/ Evaluation/ Program Evaluation/ Needs Assessment/ MBOR/ Situational Analysis/ Mission Statement and Objective/ Data Sources and Collection Methods/ Program Monitoring Systems/ BB/ INT/.

10. The Medex Group (University of Hawaii). The Medex Primary Health Care Series. Honolulu, HI: The Medex Group; 35 Vol. The thirty five volumes in this series comprise a compendium of field-tested primary health care methods and materials. Using modules, manuals, and workbooks, "the Series stresses the training of middle level health personnel as trainers and supervisors as well as providers of health services. The series also places importance on community health workers and on strengthening the associated management systems needed to support the effective delivery of primary health care services at the local level."

Shelf.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

11. Medex Primary Health Care Series. Management Training Manuals and Workbooks. Honolulu, Hawaii: University of Hawaii, John A. Burns School of Medicine; 1983.

REF-SHELF.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

12. Murthy, Nirmala and JK Satia. Experiments in Management Development: Experience of India Population Project-1 (A Monitoring System for Primary Health Centre). Nirmala Murthy ed. Ahmedabad, India: India Institute of Management; January 1981; 29 pp.

This monograph reports on a pilot project conducted in India where a monitoring system was introduced in the primary health centers in six districts. Background information is provided on the rural health system and on the monitoring system that was implemented at the health center level. After two and a half years in operation, the system was evaluated for its objectives and utility as seen by those using it. The findings of the evaluation are reported, including a discussion on management information systems. Sample data collection forms are included as report appendices.

M&E-Management Control Systems.

READ/ HLTH/ M&E/ MIS/ M&E-3/ M&E-5/ M&E-6/ ENG/ Program evaluation/ Evaluation/ Program monitoring systems/ IDI/ INT/.

13. The Population Council. Studies in Family Planning; 1979-. The FPMT library contains issues of the bimonthly journal Studies in Family Planning, dating from 1979. An annual index lists articles published each year by author, subject and geographic area. The subject and geographic indexes list articles alphabetically by title. Studies in Family Planning is an international journal that addresses family planning and related health and development issues, with emphasis on activities in developing countries.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS M&E/ FIN/ IE&C/ INT/.

14. Powell, Victor. Improving Public Enterprise Performance: Concepts and Techniques [Management Development Series No. 22]. Geneva: International Labour Office; c1987; 226 pp; ISBN 92-2-105563-9.

STR/PLN-Shelf.

PLN/ M&E/ MIS/ Strategic Planning/ ENG/ INT/.

15. Robinett, Donna (Family Planning Division). Clinic Monitoring: Pathfinder Fund; February 22, 1985; 6 pp. This is a draft of a checklist for family planning clinical monitoring. "It was originally intended as a trouble shooting guide for supervisors in charge of several clinics, but it could be used by a project manager to analyze a particular clinic." M&E-Quality Control.

TOOL/ FP/ M&E/ MIS/ ENG/ Program Monitoring Systems/ Program Evaluation/ INT/.

16. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Dealing with Data. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp. Note: This case is currently under development.

In this case, an Evaluation Officer for the family planning program finds himself responsible for developing an ongoing management information system, as well as coordinating with other agencies interested in population policy and providing support to policy decision making. In addition, the Evaluation Officer has been asked to prepare the MIS component of an urban based community distribution program. Given information on the current systems, the reader is asked to identify the advantages and disadvantages of the present system and to define the information that should be included in the reporting system and how it should be used. The teaching objectives for this case include: identifying the organizational problems in the evaluation department that have contributed to the current situation; understanding how to analyze an existing information system; and identifying the information essential to managers of the different levels of the urban based CBD program, and to understand how this information can be used to improve program management. N.B. This is one of nine cases by the same authors, that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ MIS/ M&E/ MIS-8/ M&E-1/ M&E-2/ M&E-3/ ENG/ Program evaluation/ Program monitoring systems/ Program effectiveness/ INT/.

FPMT LIBRARY - PLANNING

1. Abramson, Robert; Walter Halset. Planning for Improved Enterprise Performance: A guide for managers and consultants [Management Development Series No. 15]. Geneva: International Labour Office; 1985; c1979; 178 pp; ISBN 92-2-102082-7.
PLN-Shelf.
PLN/ ENG/ INT/.

2. Alan Guttmacher Institute. International Family Planning Perspectives; 1986-.
Published quarterly by the Alan Guttmacher Institute, this journal contains articles and special reports on international family planning topics.
REF-Shelf.
READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

3. Alfonso, Felipe B. Bali (A). Manila, Philippines: Asian Institute of Management; 1978; 19 pp.
Note: This case is located in the A.I.M. Casebook.
This case contains detailed information on Bali's family planning program. Background information is provided to the reader on the following: the history of family planning in Indonesia and in Bali; the religion of Bali; the political and social environment; and the program performance. The program has begun to experience several problems. These are briefly outlined in the final paragraphs suggesting that the reader use both the narrative information and the supplemental data in exhibit form to perform a thorough analysis and recommend an adjusted program strategy. There is an appendix to the case that is an excerpt from a book on Bali. In the excerpt the author describes the local government and village systems. NB - There is a complimentary case on Bali; Bali (B). The author is Alejandro A. Reyes.
PLN-Shelf.
CASE/ FP/ PLN/ PLN-5/ PLN-6/ ENG/ Demand for Contraceptives/ Community Participation/ Target Setting/ Project Development/ IND/ INT/.

4. Allman, James, Yves Alexandre, Michelle Edouard, Raynald Pierre-Louis, Tom Lyman-Fenn, Joe Wray. Building on What Works: Malaria Volunteer Workers Delivering Family Planning and Primary Health Care in Rural Haiti. New York, NY: Center for Population and Family Health, Faculty of Medicine, Columbia University; June 1984; 17 pp. (Working Paper Series; (Working Paper 6)).
This is a detailed report of a project conducted in Haiti that utilized the malaria volunteer workers in the rural areas to deliver family planning services. The background and the results of the project are detailed with sections describing the characteristics, problems and the prospects for the project.
PLN-Integrated Programs.
READ/ FP/ PLN/ PLN-6/ ENG/ Integrated programs/ Family planning programs/ Program planning/ HAI/ INT.

5. Alphonso, Felipe B. Mechai Viravaidiya (A). Manila, Philippines: Asian Institute of Management; 7 pp.

Note: This case is contained in the AIM Casebook.

This case profiles the planning process undertaken by the founder of the Thai Family Planning program, Mechai Viravaidiya. The policy environment is described, as are the steps he used to perform a needs assessment and to write long term program goals and a preliminary action plan. The alternatives that Mechai Viravaidiya considered for both distribution and financing are detailed, providing the reader with a sense of the origins of this innovative and successful program. NB: This casebook contains another case that looks at the same program after it is well established. It is entitled, "The Family Planning and Rural Development Associates (FPA)".

PLN-Shelf.

CASE/ FP/ PLN/ PLN-3/ PLN-4/ PLN-6/ ENG/ Program Planning/ Needs Assessment/ Situational Analysis/ THA/ INT/.

6. American Management Association. Close to the Customer: An American Management Research Report on Consumer Affaires. New York, NY: AMA Membership Publishing Division; 1987; 96 pp.

PLN-Shelf.

PLN/ ENG/.

7. Analisis de Entorno, Projeccion del Cambio, y Planificacion a Nivel de Empresa (Analyzing the Environment, Predicting Change, and Planning at the Business Level) pp.

This article, while recognizing the difficulty of predicting the future, presents a framework and concepts for strategic planning.

PLN.

TOOL/ GEN/ PLN/ SPA/ INT/ strategic planning.

8. Andrews, K. R. El Concepto de Estrategia de la Empresa (The Concept of Business Strategy); 14 pp. (A Concept of Corporate Strategy).

The author attempts to clarify the idea of business strategy and demonstrate its uses and weaknesses.

PLN - strategy.

TOOL/ GEN/ PLN/ SPA/ strategy/ INT/.

9. Anonymous. Analyse De L'Etat Sanitaire Dans Nos Villages ou Quartiers; 8 pp.

This is an instrument which can be used to assess the health status in a village or district.

PLN-Needs Assessment.

TOOL/ HLTH/ PLN/ PLN-4/ FRE/ Needs Assessment/.

10. Anonymous. The Competency Model Method; 5 pp.

This piece is a discussion of a needs assessment methodology called the competency model. Included is a description of the process and some suggestions for applying this methodology. The concluding section lists the advantages and disadvantages of this method. NB - There is a related piece called "Problem Analysis Method", filed under PLN- Needs Assessment.

PLN-Needs Assessment.

TOOL/ GNL/ TOT/ HRM/ PLN/ PLN-4/ ENG/ Needs Assessment/ Operating Procedures/ Organizational Diagnosis/ Interpersonal Communications/ INT/.

11. Anonymous. Criteres Pour La Selection Des Problems; 1983; 5 pp.

This piece provides selected criteria to help in prioritizing problems that need to be solved. In an outline form, it is divided into the following sections;: technological criteria; health criteria; social criteria; and, planning criteria. Attached is a page that discusses and illustrates the elements of public health objectives.

PLN-Needs Assessment.

TOOL/ HLTH/ PLN/ PLN-4/ PLN-3/ FRE/ Problem Identification/ Objective Setting/.

12. Anonymous. Group Goal Setting; 6 pp.

This is a collection of information on planning, goal setting and objective setting that is intended for classroom use as overhead transparencies.

PLN-Program Cycle.

TOOL/ GNL/ PLN/ PLN-1/ PLN-2/ PLN-3/ ENG/ Mission Statement and Objectives/ Strategic Planning/ Goal Setting/ Objective Setting/ Project Development/.

13. Anonymous. Planning Outline; 11 pp.

This is an outline of some of the steps involved in strategic and operations planning. It covers: internal assessment of the organization; assessment of the external environment; concepts of information flow; and planning activities. Attached are portions of several other outlines with the same focus.

PLN-Strategic Planning.

TOOL/ FP/ PLN/ PLN-2/ PLN-4/ ENG/ Strategic planning/ Program planning/ Needs assessment/ Situational analysis/ Mission statement and objectives/ INT/.

14. Anonymous. Problem Analysis Method; 3 pp.

This piece describes the problem analysis method of needs assessment. Included is a description of the process and some suggestions for how to apply this method. A list of advantages and disadvantages to using this method conclude the piece. NB - There is a related piece called the "Competency Model Method", filed under PLN-Needs Assessment.

PLN-Needs Assessment.

TOOL/ GNL/ PLN/ PLN-4/ ENG/ Needs Assessment/ Problem Identification/ INT/.

15. Anonymous. Research on the Effects of Availability and Accessibility of Contraceptives; 3 pp.

Review of evidence on the effects of availability and accessibility of contraceptives. The report concludes that for countries with well developed family planning programs, improving availability (supply) may be more important than motivational services (demand stimulation) in bringing about increased contraceptive use.

PLN-Improving Access to Family Planning.

READ/ FP/ PLN/ PLN-2/ ENG/ Availability/ Access/ Demand for Contraceptives/ INT/.

16. Anonymous. Sterilization: The Challenge of Expanded Services; 6 pp.

This article discusses an expanded sterilization program. It illustrates the types of objectives and steps taken in the strategic planning process and can be used by trainers as an example of the options available for the process.

PLN-Strategic Planning.

READ/ FP/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/ Mission Statement and Objectives/ BAN/ IDI/ INT/.

17. Arias, Maria Eugenia (The Family Planning Management Training Project). A Transfer. Boston, MA: Management Sciences for Health; 1987; 2 pp.

In this short case set in Africa, a midwifery sister working for the Local Government Area is being transferred to a new community where she will be responsible for planning and implementing a family planning program. Some background information on the midwife's previous work is given and on the community she is being transferred to. The leader is asked to assume her role and to identify the information needed to draw up a plan, as well as some of the anticipated obstacles to implementation. Trainers could use this case as the basis for a group discussion or a prepared assignment. Written questions accompany the case.

PLN-Program Cycle.

CASE/ FP/ HRM/ PLN/ HRM-1/ PLN-4/ PLN-5/ PLN-6/ ENG/ Strategic Planning/ Program Planning/ Needs Assessment/ Community Survey/ User Perspective/ Implementation/ AFR/ INT/.

18. La Asociacion para la Planificacion Familiar y el Desarrollo Rural (The Association for Family Planning and Rural Development (FPA)); 13 pp.

The head of a family planning and development organization in a fictional country realizes the organization must undergo profound change in the upcoming years.

PLN - family planning.

TOOL/ GEN/ FP/ PLN/ SPA/ INT/.

19. Austin, James E. (Harvard School of Public Health). The Management Bottleneck in Family Planning Programs. Studies in Family Planning; December 1973; 4(12).

This article presents a conceptual framework that will help family planning administrators and advisors to understand the nature and requirements of the management task. Also presented are a series of diagnostic questions that family planning administrators and advisors can use to analyze the management aspects of family planning programs and systems.

HRM-Management, General.

READ/ TOOL/ FP/ HRM/ PLN/ ENG/ Strategic planning/ Goal setting/ Implementation/ Management/ INT/.

20. Baker, Rodney R., Ph.D. and Norman M. Paris, Ph.D. Manual for Force Field Analysis: A Problem Solving System; 13, plus worksheet pp.

This manual presents a problem solving system called force field analysis. In this system, the problem is identified and then the forces driving and the forces inhibiting the desired outcome are listed. The third step is strategy planning and the fourth step is action planning. The manual describes the process in detail and is accompanied by a worksheet to use in performing the analysis.

PLN-Environment Analysis.

MAN/ READ/ TOOL/ GNL/ PLN/ PLN-5/ Problem Identification/ Situational Analysis/ Program Planning/ Implementation/ INT/.

21. Barry, Bryan W. Que es Planificacion Estrategica? New York: Amherst H. Wilder Foundation; 1986; 9 pp. (Strategic Planning).

A basic introduction to the process by which an organization determines its goals and by what means it will achieve them. Gives pros and cons of strategic planning as well as a brief guide to the process.

PLN-Strategic Planning.

TOOL/ GEN/ PLN/ SPA/ INT/.

22. Barry, Bryan W. (Management Support Services, Amherst H. Wilder Foundation). Strategic Planning Workbook for Nonprofit Organizations. New York, New York: Publishing Center for Cultural Resources; 1986; 81 pp.

Note: Photocopy.

This workbook provides a thorough, clear, step by step guide to aid non-profit organizations in developing a strategic plan. It is divided into three sections. Section I is an overview of strategic planning that defines the process, discusses the need for it and its limitations, and how you can develop a plan. Section II is a guide for developing, implementing, and updating a strategic plan. Section III includes an example of a strategic plan for a community health center, and has worksheets that can be used in developing a workplan. Trainers could use this workbook as a component of any course or workshop on strategic planning. The format allows the reader to develop skills in going through the planning process and the worksheets provide an opportunity to practice the skills. Throughout the text, are a series of cartoon drawings which could be used by trainers to make overhead transparencies.

STR/PLN-Shelf.

MAN/ TOOL/ READ/ HLTH/ PLN/ PLN-1/ PLN-2/ ENG/ Strategic Planning/ Mission Statement and Goals/ Situational Analysis/ Goal Setting/ Objective Setting/ Target Setting/ BB/ RTI/ INT/.

23. Bellamine, Hammouda. Case Study In Family Planning Management: Republic of Keutaga; November 1986; 23 pp. Written for a CAFS training course held in Nairobi, this case contains a comprehensive description of the fictitious country of Keutaga. Divided into five sections, the narrative includes: a profile of the country; population and demographic data; health data; a discussion of population and development; and, the current family planning situation. Supplementing the narrative are many exhibits of demographic, agricultural, economic, educational, health and contraceptive data. Although the case lacks teaching notes or prepared questions, trainers could use this in a number of ways. Possibilities include using the data to perform a needs assessment or situational analysis, or as the basis for a discussion on general management issues.

PLN-Strategic Planning.

CASE/ FP/ PLN/ PLN-4/ PLN-6/ ENG/ Population Dynamics/ Management, General/ Family Planning Programs/ Needs Assessment/ Situational Analysis/ AFR/ INT/.

24. Below, Patrick J., George L. Morrison, and Betty L. Acomb.,
Translator: Lorena Castillo J. for FPMT Ecuador. Que es
Planificacion Estratigica? (What is Strategic Planning?). San
Francisco, CA: Jossey Bass Management Series; Jan 1988; 13 pp.
(The Executive Guide to Strategic Planning (c) 1987).
An introduction to the basics of strategic planning as the first
part of Below's "Process of Integrated Planning". Gives
components and steps for group formation of a strategic plan.
With graphics.
Strategic Planning.
TOOL/ GEN/ PLN/ SPA/ INT/.
25. Beneficios e Inquietudes (Benefits and Worries); 9 pp.
Seven tables designed to form a summary of the course in an
exercise form.
EXER/ GEN/ PLN/ SPA/ INT/.
26. Bennett, Anthony, Abdel Rahman El Tom, Don Lauro, Deborah
Maine, M. Haytham Matthews and Mechai Viravaidya. Mini-Survey In
Matrix Format: An Operations Research Tool. New York: Center for
Population and Family Health; April 1983; Working Paper 4; 19 pp.
This paper describes a new format for operations research called
the matrix format mini-survey. Examples of how this format has
been used in Thailand and in the Sudan are given, accompanied by
the questionnaire and the data forms used in each country.
Trainers might be able to use this as the basis for a discussion
on designing operations research tools for monitoring and
evaluation purposes.
PLN-Operations Research.
READ/ TOOL/ FP/ PLN/ PLN-4/ PLN-5/ PLN-6/ ENG/ Operations
Research/ Questionnaires/ Data Collection/ Program Evaluation/
THA/ SUD/ INT/.
27. Bergthold, Gary D., Galo Pozo and Edgar Jacome Salvador.
Bottom-Up Planning in Rural Ecuador. Casebook For Family Planning
Management. Korten, Francis F. and David C. Korten. USA: The
Pathfinder Fund; 1974; c1977: p203 - p242; 40 pp.
Note: This case is the tenth of twelve located in the Casebook
For Family Planning Management.
This case focuses on the role of training as a key management
tool for family planning programs. The reader is asked to
advise the head of the Ecuadoran Ministry of Health's family
planning program on whether a specific training program will
improve the performance of clinic personnel. A detailed
description of the training program is given, including a
narrative tracking a group of trainees through the program and
evaluating their performance once back in their work environment.
This complex case raises many issues about training design,
motivation, supervision, performance appraisal, target setting,
objective setting, action steps, and program performance. A
study guide precedes the case, posing questions for the reader to
consider while reading the case." [A comprehensive analysis
follows looking at what actual changes, resulted in the training

program] how the training caused these changes, and what problems resulted." Trainers could use this case as the basis for a session on staff development, or training as a component of human resource management.

HRM-Shelf.

CASE/ FP/ HRM/ PLN/ HRM-1/ ENG/ SPA/ In-service Training/ Target Setting/Objectives Setting/ Action Plan/ Performance Appraisal/ Staff Development/Supervision/ Participative Management/ ECU/ LAC/ INT/.

28. Blumhagen, Rex V.; Jeanne Blumhagen. Family Health Care: A Rural Health Care Delivery Scheme. Wheaton, ILL: Medical Assistance Programs, Inc.; 1974; 105 pp.

PLN-Shelf.

PLN/ ENG/.

29. Bongaarts, John (Center for Policy Studies). A Simple Method for Estimating the Contraceptive Prevalence Required to Reach a Fertility Target. Studies in Family Planning; July/August 1984; 15(Number 4): pp 184-190.

This is a technical paper describing a target setting methodology that can be used by planners to determine an estimate of the contraceptive prevalence rate that a country would need to attain in order to achieve a specified reduction in fertility. The model used identifies the proximate determinants of fertility as: marriage pattern; contraceptive prevalence and effectiveness; induced abortion; postpartum infecundability; frequency of intercourse; spontaneous abortion; and sterility. The author applies the model using several examples which provides the reader with a clear sense of the utility of such a model in the planning process. Trainers might be able to use the article to create an exercise on target setting having participants use data from their respective countries. The paper could also be used to illustrate the variety of factors affecting the target setting process.

PLN-Goal setting.

READ/ EXER/ FP/ PLN/ PLN-3/ Target setting/ Strategic planning/ Demographic factors/ Fertility/ INT.

30. Brinkerhoff, Derick W. and Janet C. Tuthill. La Gestion Efficace des Projets de Developpement. West Hartford, Connecticut: Kumarian Press; 1987; 185 pp.

Note: This text was written in French and is not a translation. Focusing on developing countries, this manual discusses the theory and techniques for program planning and implementation. The text is divided into four main sections. Part I is an introduction to the manual. Based on an analysis of successful projects, Part II details the project cycle and characteristics of program implementation. At each stage of the cycle the reader is referred to the appropriate section of Part III which contains 12 modules on specific tools and techniques that can be utilized. Part IV discusses evaluation, specifying the need for evaluation and showing the link between evaluation and management

emphasizing the impact evaluation can have on decision making.
PLN-Shelf.

READ/ EXER/ TOOL/ MAN/ GNL/ HRM/ M&E/ PLN/ PLN-4/ FRE/ Program
planning/ Implementation/ Gantt chart/ MBOR/ Project development/
Needs assessment/ Decision making/ Team building/ Management of
groups/ FAF/ HAI/ INT/.

31. Brown, Richard C., and J. E. Brown. La Consultation de
Contraception en Afrique. Norfolk, VA: The Presbyterian Hunger
Program; 1983; 147 pp.

This book was written as a manual for health personnel in Africa
who want to start a contraceptive service based in a clinic or a
hospital. Techniques, equipment and supplies necessary to work
with contraception, are all described. There is also a guide for
the use of each contraceptive method. The book reviews the
rationale for individual consultations and other technical
elements related to the provision of contraceptive services. In
addition, there is a section on the actual design and
organization of the contraceptive program that details the
following issues: space; visiting hours; personnel; building
location; equipment; supplies; and payment. Supplementing the
manual are: sample forms and questionnaires; most often asked
questions; and, situations for discussions.

PLN-Shelf.

MAN/ TOOL/ READ/ PLN/ PLN-6/ FRE/ Family Planning Programs/
Equipment and Supplies/ Contraceptive Technology/ Contraceptives
Methods/ Clinic Based Delivery Systems/ Fee for Services/ AFR/
BB/ INT/.

32. Brownlee, Ann: Thomas C. Nchinda and Yolande Mousseau-
Gershman. Health Services Research Course: How to Develop
Proposals and Design Research to Solve Priority Health Problems.
Boston, MA: Boston University; 1983; 371 pp.

Note: There is a Course Guide for Administrators and Trainers
contained in a separate volume.

PLN-Shelf.

PLN/ COURSE/ TOOL/ ENG/.

33. CEDPA. Manual on Planning Implementation and Management of
Development Projects. Washington, DC: CEDPA; 50 pp.

Note: 8 copies: 3 English, 3 French, 2 Spanish.

The purpose of this manual is to help managers in the developing
world to improve their skills in planning, implementing and
managing projects. The manual is divided into two chapters. The
first chapter discusses Project Planning and Proposal
Development, and chapter 2 discusses Project Monitoring. A
detailed description of each step of the process is given and
illustrated with examples of family planning projects. Chapter 1
specifically addresses: needs assessment; problem identification
and selection; data collection and analysis; proposal
preparation; work plan-development; projecting staffing needs;
and determining the project budget. Chapter 2 details:
establishing a record keeping system; reporting on project

progress; and financial monitoring and reporting. The manual would be useful as reading and reference for project managers and could provide trainers with in-depth information to prepare training sessions on any of the topics covered in the text.
PLN-Shelf.

MAN/ FP/ M&E/ M&E-1/ M&E-2/ PLN/ PLN-1/ PLN-2/ PLN-3/ PLN-4/ ENG/ FRE/ SPA/ Strategic planning/ Situational analysis/ Needs assessment/ Proposal writing/ Goal setting/ Program evaluation/ INT/ BB2.

34. CEDPA. Writing The Implementation Plan. Washington, D.C.: CEDPA; 29 pp.

This is an outline for a four hour session entitled "Writing The Implementation Plan". The session takes the participant through the processes involved in writing a plan, including: identifying project objectives, activities and tasks; sequencing activities; allocating resources; planning a time frame; monitoring; planning a time line; and reviewing the plan. There are detailed session notes on the logistics and the content, with a separate set of notes for the facilitator.

PLN-Program Cycle.

COURSE/ GNL/ PLN/ PLN-5/ ENG/ Implementation/ Program Planning/ Workplans/.

35. Center for Population and Family Health. Operations Research Program. Conference on the Oyo State CBD Project: Community-Based Delivery of Health and Family Planning Services; January 14-16, 1985; Ibaden, Nigeria. New York: Center for Population and Family Health; May 1985; 216 pp.

The papers presented in this volume "describe the processes involved, the problems encountered, and some of the results obtained when an approach to Primary Health/Family Planning services developed in a CBD project, was replicated on a larger scale. The projects were carried out by two universities in Nigeria and replicated on a larger scale by the Oyo State Health Council. The contents of the volume include some 28 presentations, including: The Use of Community Health Workers in Health Care Delivery; Family Planning Service in Nigeria; Community-Based Delivery of Primary Health Care and Family Planning Services; An Historical and Global Overview; Supervision and Management in Oyo State CBD Project; and, A Case Study of the CBD Worker - Focus on Health Education Activities. A trainer might use selected presentations as a background reading or as the basis for a classroom discussion.

PLN-Shelf.

READ/ FP/ PLN/ PLN-6/ ENG/ Operations Research/ CBD Projects/ Community Health Workers/ FP Programs/ Supervision/ NIR/ INT/.

36. Centers for Disease Control. Family Planning Methods and Practice: Africa / Planification Familiale: Methodes et Pratiques pour l'Afrique. Atlanta, GA: Centers for Disease Control (CDC); 1983; 329 pp.

Note: 2 copies: 1 English, 1 French.

This comprehensive book provides a technically oriented reference to family planning methods and practices in Africa. It is written to serve students in the medical profession, trainers, health personnel, program directors, politiciens and international organizations. Divided into four parts, the book opens with a detailed analysis of family planning in the African context. Part II describes the important physiological aspects of contraception. Part III details contraceptive technology with a chapter on each method. The final section is on family planning service delivery. The book contains numerous illustrations and tables that supplement the text. Trainers could use this as background information to familiarize themselves with the African context and as a reference on the technical aspects of family planning.

PLN-Shelf.

READ/ FP/ PLN/ PLN-6/ FRE/ ENG/ User Perspective/ Family Planning/ Contraceptive Technology/ Contraceptive Methods/ Health Benefits of Family Planning/ AFR/ INT/.

37. Chambers, Richard. Managing Rural Development: Ideas and Experience from East Africa. West Hartford, CT: Kumarian Press; 1985; 216 pp.

Using examples from East Africa, the author explains how management procedures applicable to development settings throughout the world are fundamental to solving the problems of delivering project benefits to the rural population. Written in clear language, the book contains chapters on the following: the impetus for rural development; program planning and implementation; management of evaluation. The thrust is the book is careful realistic planning as an essential element of program success. This could be used as a background reading or as a resource for participants to have in their own library.

PLN-Shelf.

READ/ GNL/ PLN/ HRM/ Program planning/ Implementation/ Supervision/ Work plan/ Community participation/ Community survey/ INT/ AFR.

38. Chen, Pi-chao, Ann Elizabeth Miller. Lessons from the Chinese Experience: China's Planned Birth Program and its Transferability. Studies in Family Planning; 1975; 6(Number 10): pp. 354-366.

"This article describes the most salient developments in the planned birth program of the People's Republic of China during the 1970's and discusses the potential for transfer of some features to other countries." Trainers could use this as the basis for a discussion, as the PRC has substantially altered its policy since the writing of this article, moving away from integrated family planning service delivery to vertical family

planning programs. NB: This is one of 4 background readings for a 2 1/2 hour session on "The separation of integrated health and family planning services in China." The other readings document different aspects of this shift in policy. (The other readings are located in the same vertical file).

PLN-Integrated programs.

READ/ FP/ PLN/ PLN-6/ POL/ ENG/ Family planning programs/ Integrated programs/ Economic development policy/ Program planning/ Service delivery systems/ PRC/ INT.

39. Coeytaux, Francine, and Taoufik Kilini, Margaret McEvoy. Outreach: A Luxury Or A Necessity? A Quantative Look At Mobile Family Planning Services In Tunisia. Boston, MA: Pathfinder Fund; November 19, 1985; 8 pp.

This is a report on an operations research study which "succeeded in isolating and measuring the impact of IEC outreach on the use of family planning services in Tunisia". Background information on the project is given, followed by a discussion of the methodology and the results of the project. The report concludes with a discussion of the use of mobile units and how IEC has been added as an effective component of these units.

PLN-Mobile Units.

READ/ FP/ IEC/ PLN/ PLN-4/ ENG/ Operations Research/ IE&C/ Mobile Units/ TUN/ INT/.

40. Coeytaux, Francine, MPH, and Dayl Donaldson, MA, MPH. Evaluation of Mobile Family Planning Services in Tunisia. Boston, MA: Pathfinder Fund; September 30, 1986; 8 pp.

This concise paper reports on an evaluation of mobile family services in Tunisia. Background information is given on the country and this service delivery system. This is followed by an analysis of this system in terms of the couple-years of protection derived from the mobile units and the cost-effectiveness of this form of service delivery. Trainers could use this to illustrate mobile service delivery and to discuss issues of resource allocation.

PLN-Mobile Units.

READ/ FP/ PLN/ FIN/ PLN-6/ Resource Allocation/ Mobile Units/ Cost Effectiveness Analysis/ Service Delivery Systems/ TUN/ INT/.

41. Collerette, Pierre et G. Delisle. Le Changement Planifie. 2 ed. 6872 est, rue Jarry, Montreal, Quebec H1P 3C1, Canada: Les Editions Agence d'ARC Inc.; 1982; 211 pp.

This book focuses on the dynamics of change within an organization. The authors present methodologies and techniques for planned and effective change. Among the topics discussed are: planned change; formation of attitudes; force feild analysis; the objectives of change or intervention; resistance to change; strategic choices; and the actors in a strategy for change. Each chapter contains review questions to assist the reader.

HRM--Shelf.

READ/ GNL/ HRM/ PLN/ HRM-4/HRM-10/ FRE/ Organizational

Development/ Management of Change/ Resistance to Change/ BB/
INT/.

42. Columbia University Center for Population and Family Health.
Rahman El Tom, Abdul, M.D., Abdul Aziz Farah, Ph.D., Donald
Lauro, Ph.D., Thomas Fenn, M.A. Community and Individual
Acceptance: Family Planning Services in the Sudan. New York, NY:
Columbia University; 1985; 40 pp. (Working Paper Series; 14).
This research paper on Sudan's Community Based Family Health
Project looks at data obtained from pre-and-post project survey.
Principal findings: 1) Community variables such as location,
proximity to paved roads, influence contraceptive use
independently of numerous individual and socioeconomic variables;
2) Fertility and child mortality have important and opposite
effects on contraceptive use; 3) Several socio-economic variables,
including maternal education, affect contraceptive behavior in
expected directions, though variables such as father's education
and occupation fail to differentiate between users and non-users;
4) Village midwives can be used successfully to promote health
attitudes and practices that are positively associated with
fertility regulation.
PLN-CBD Program.
READ/ FP/ PLN/ ENG/ Operations research/ Community survey/
Community participation/ CBD programs/ Demand for contraceptives/
Nurse midwives/ INT/ SUD.

43. Commonwealth Secretariat. A Manual on Project Planning for
Small Economies. London, England: The Project Planning Centre for
Developing Countries; May 1982; 210 pp.
PLN-Shelf.
PLN/ ENG/.

44. Community Nutrition Action For Child Survival.
Washington, D.C.: Center For Development and Population
Activities; 5 pp.
Note: This is taken from CEDPA'S Nutrition Manual.
This hour long exercise focuses on community participation and
demonstrates the advantages of working with the community to plan
and carry out action projects. While the context of this
exercise is nutrition, it could be readily adapted to family
planning. It is an easy exercise and could be introduced at an
early stage of a training program to illustrate this concept, and
to help in group building and in facilitating group process.
POL-Community Participation & PLN-Program Cycle.
EXER/ HLTH/ POL/ PLN/ POL-2/ POL-3/ PLN-2/ PLN-3/ PLN-5/ ENG/
Community Participation/ Communication process/ Nutrition/ IEC
Programs/ Program Design/ INT.

45. Content Session Preparation Sheet - Management of Delivery Systems.

This is an outline for a training session on the management of delivery systems. The objectives of the session include: defining delivery systems and explaining their clinical use in community and commercial family planning and health delivery; present the health and f.p. commodities suitable for field delivery in-country; describe how they are being used; and provide a management framework for different approaches to health development and f.p. delivery. This might be useful for trainers who are preparing a course on the selection and management of delivery systems.

PLN--Program Cycle.

TOOL/ FP/ PLN/ PLN-6/ ENG/ Program Selection/ Service Delivery systems/ Family Planning Program/ INT/.

46. Cornelius, Richard M., and John A. Novak. Contraceptive Availability and Use in Five Developing Countries; 15 pp.

This paper examines research on contraceptive availability and accessibility in Thailand, Columbia, Honduras, Costa Rica and Nepal. Variables explored by the study include: the travel time to the source of contraception; method preference; and levels of family planning knowledge. The different variables are correlated both in the text and in the graphs and tables that accompany the text. This could serve as a background reading for a discussion on the factors that need to be addressed in designing family planning programs.

PLN-Improving Access to Family Planning.

READ/ FP/ PLN/ PLN-6/ ENG/ Access/ FP Programs/ Program Planning/ User Perspective/ Demand for Contraceptive/ Needs Assessment/ NEP/ COS/ HON/ THA/ COL/ INT/.

47. Crandon, Libbet Dr. Women, Enterprise and Development: Pathfinder Fund; September 1980 - December 1984; 167 pp.

This is a comprehensive report on five projects undertaken by the Pathfinder Fund to support Woman in Development. The projects were designed as group-owned productive enterprises, operating in the formal economic sector. The report includes information on project development, implementation and an evaluation of each project. The projects were located in Brazil, Costa Rica, Honduras and Jamaica.

PLN-Shelf.

READ/ GNL/ FIN/ PLN/ FIN-2/ FIN-3/ PLN-1/ PLN-2/ PLN-5/ ENG/ Project Development/ Implementation/ Women's Programs/ Resource Development/ Income Generation/ Program Planning/ BRA/ COS/ HON/ JAC/ INT/.

8. Anonymous. La Dynamique de Groupe et Une Approche Systematique a l'Execution des Taches dans un Groupe; 13 pp. (Developpement des Ressources Humaines (DRH/FR)).

These are trainers notes for a five-hour mini-course on group dynamics and task execution. The objectives include: defining the concept of a group; describing the difference between task and process; listing the steps that move a group toward maturity; identifying characteristics that are universal to all groups; and listing and explaining the stages of a systematic approach.

HRM- Management of Groups.

Course/ GNL/ HRM/ HRM-1/ FRE/ Management of Groups/ INT.

9. Anonymous. El Libertador: Health Care Delivery In A Caracas Barrio. Tunis; May 15-17, 1984; 17 pp.

This two part case is a discussion of various aspects of a health service post in a poor urban settlement in Venezuela. The first part of the case focuses on the implications for the health post of a structural reorganization and decentralization of the Health Ministry. Background information is provided and the reader is asked to analyze the reorganization, and to make recommendations as to how the limitations might be overcome. The reader is asked to assess the decentralization in terms of such variables as: personnel training; anatomy; information; patient relations; and service coverage; In the second part of the case, the analysis focuses on logistics support from the Ministry of Health. The reader is then asked to determine what institutional changes could be made and how human resources could be utilized to overcome organizational deficiencies. The analysis could be the basis for classroom discussion or the basis for a written assignment.

Hrm-Organizational Development.

CASE/ HLTH/ HRM/ LOG/ HRM-10/ LOG-1/ Organizational Development/ Logistics Cycle/ INT/.

10. Anonymous. Exercices Des Carres; 2 pp.

This is an exercise to two different methods of communications.

HRM-Communications Skills.

EXER/ GNL/ HRM/ HRM-9/ FRE/ Interpersonal communications/ DOM/.

11. Anonymous. Foundations and Dynamics of Intergroups Behavior; 30 pp.

Presents theory of behavior dynamics in groups and a framework for viewing intergroup conflict.

HRM-Organizational behavior.

READ/ GNL/ HRM/ HRM-10/ Organizational behavior/ Conflict resolution/ INT.

12. Anonymous. Group Decision Making; 3 pp.
Brief summary of 6 types of decision-making: 1) lack of response; 2) authority rule; 3) minority; 4) majority rule: voting and/or polling; 5) consensus; and 6) unanimous consent.
HRM-Supervision.
READ/ GNL/ HRM/ HRM-9/ ENG/ Decision making/ INT.

13. Anonymous. Organizational Diagnosis; 12 pp.
This paper discusses organizational design and the impact it can have on the effectiveness of an organization. The paper is divided into four major sections that dissect and analyze the topic. The first section focuses on factors that are fundamental to an organizations success and addresses the forces operating in the external environment as well as the need to maximize internal strengths by effective management. The second section looks at alternative ways of organizing - differentiation of specialized tasks and coordination of these efforts, The third section is on diagnosing organizational problems, and details the processes for the collection, analysis and feedback of information. The paper concludes with a brief note on how managers can use this process to effect change within an organization. This paper is oriented towards a business environment, but the information it contains is readily transferrable to a health care setting.
HRM-Organizational Diagnosis.
Read/ GNL/ HRM/ HRM-10/ ENG/ Organizational Diagnosis/
Organizational Design/ Organizational Development/ INT/.

14. Anonymous (Harvard Business School). An Overview Of Organizational Behavior: Diagnosis and Action. Boston, MA: Harvard Business School; 1983; 9 pp.
This is a note that includes an outline of a full academic course on organizational behavior. The author describes the focus, goals and organization of each section in the course. The sections include: managing groups; managing conflicts; managing performance; developing influence in the larger organization; and, leading and managing. The paper could aid trainers in preparing a module on any one of the topics addressed. A bibliography on related reading materials is also included.
HRM-Organizational Behavior.
READ/ TOOL/ COURSE/ GNL/ HRM/ HRM-10/ HRM-1/ ENG/ Management of Groups/ Organizational Behavior/ Conflict Resolution/ Institution Building/ Organizational Development/ INT/.

15. Anonymous. A Program for Health Manpower Development; 1984; 4 pp.
This case describes a health manpower problem in a developing country. Background information is provided on the country and on how health manpower is utilized in the delivery system. The reader is asked to address the manpower issue, taking into account distribution training and shortages, caused in part by emmigration of trained health personnel to western countries. A six step program to remedy the problem is outlined and the reader is asked to identify the advantages, the expected shortcomings

and the possible shortcomings for each step. The case is designed to raise multiple issues about manpower planning and could be used as the basis for class discussion or for a written analysis. NB: Accompanying the case are the notes of a student who analyzed the case.

HRM-Manpower planning.

CASE/ HLTH/ HRM/ HRM-7/ ENG/ Manpower planning/ Manpower supply/ Manpower projections/ Manpower requirements/ In-service training/ Supervision/ INT.

16. Anonymous. Sample Job Description: Executive Director; 1 pp. Sample job description of an Executive Director of a Family Planning Association, developed during the II Francophone Family Planning Management Workshop in Lome (Fall 1987).

HRM-Job Description.

TOOL/ FP/ HRM/ HRM-2/ FRE/ Job Description/ AFR/ INT/.

17. Anonymous. Supervision Forms; 9 pp.

This a data collection instrument to be used by supervisors in monitoring the activities and performance of service delivery at the health post level. Used in Senegal, this format can be used as an example for discussion purposes or as a model to construct family planning data collection tools.

HRM-Supervision.

TOOL/ HLTH/ HRM/ HRM-9/ FRE/ Supervision/ SEN/ INT/.

18. Anonymous. Supervision Tool; 3 pp.

This is a sample form used in Senegal to monitor activities at the health post level. It could be used as the basis to construct other supervision tools.

MIS-Supervision.

TOOL/ HLTH/ MIS/ HRM/ M&E/ M&E-3/ MIS-6/ HRM-9/ FRE/ Supervision/ Performance Appraisal/ Program Evaluation/ Program Monitoring Systems/ SEN/ INT/.

19. Anthony, Robert. Control Gerencial (Managerial Control); 29 pp.

The article deals with developing systems of managerial control, through motivation, as a means of achieving goals.

HRM - managerial control.

TOOL/ GEN/ HRM/ SPA/ INT/ managerial control/ motivation/.

20. Anthony, Robert N., and Dearden, John. La Evaluacion del Desempeno (Evaluation of Performance). Illinois: Richard D. Irwin, Inc. Restricted distribution.; 17 pp. (Management Control Systems).

The article deals with various means of evaluation and compares lax administration with rigid.

MIS - performance evaluation.

TOOL/ GEN/ HRM/ MIS - performance evaluation/ SPA/ INT/.

21. Anthony, Robert N., and Dearden, John. La Naturaleza del Control Gerencial (The Nature of Managerial Control); 24 pp. The article describes the nature of managerial control, distinguishes between it and other forms of planning and control and between it and other functions of management. It concludes with the elements of managerial control.

HRM - managerial control.

TOOL/ GEN/ HRM - managerial control/ HRM/ SPA/ INT/.

22. Argyris, Chris. Reasoning, Learning, and Action: Individual and Organizational. San Francisco, CA: Jossey-Bass Publishers; c1982; 499 pp. (The Jossey-Bass Series in Social and Behavioral Science & in Management Training, and Development); ISBN 0-87589-524-7.

HRM-Shelf.

HRM/ ENG/.

23. Arias, Maria Eugenia, Karen Blumenfeld, Bruce Gill, Kevin Lake, Barbara Stern (Yale School of Organization and Management). Introduction to Self Management: A Teaching Module; 1985; 100 pp.

This 2 - 2 1/2 hour module introduces the concept of self-management with a combination of role play exercises and lectorettes. The role play exercise is designed to highlight the differences between working in a self-managing context versus a hierarchical context. After the role-play is completed and trainers have debriefed participants, the module concludes with two lectorettes. Using overhead transparencies, the lectorettes covers: assumptions about humans that support self-management; the condition and tests for self management; and some of the advantages and pitfalls. In addition to objectives, a list of necessary resources and equipment, a schedule, and preparation notes. This comprehensive package includes; teaching notes for each component; a "script" for each lecturette; role play instructions and materials; and copies for transparencies.

HRM-Self management.

EXERCISE/ LECTURE/ ENL/ HRM/ HRM-3/ ENG/ Self management/ Management style/ INT.

24. Arias, Maria Eugenia (The Family Planning Management Training Project). A Transfer. Boston, MA: Management Sciences for Health; 1987; 2 pp.

In this short case set in Africa, a midwifery sister working for the Local Government Area is being transferred to a new community where she will be responsible for planning and implementing a family planning program. Some background information on the midwife's previous work is given and on the community she is being transferred to. The leader is asked to assume her role and to identify the information needed to draw up a plan, as well as some of the anticipated obstacles to implementation. Trainers could use this case as the basis for a group discussion or a prepared assignment. Written questions accompany the case.
PLN-Program Cycle.

CASE/ FP/ HRM/ PLN/ HRM-1/ PLN-4/ PLN-5/ PLN-6/ ENG/ Strategic Planning/ Program Planning/ Needs Assessment/ Community Survey/ User Perspective/ Implementation/ AFR/ INT/.

25. Austin, James E. (Harvard School of Public Health). The Management Bottleneck in Family Planning Programs. Studies in Family Planning; December 1973; 4(12).

This article presents a conceptual framework that will help family planning administrators and advisors to understand the nature and requirements of the management task. Also presented are a series of diagnostic questions that family planning administrators and advisors can use to analyze the management aspects of family planning programs and systems.

HRM-Management, General.

READ/ TOOL/ FP/ HRM/ PLN/ ENG/ Strategic planning/ Goal setting/ Implementation/ Management/ INT/.

26. Baker, Rodney R., Ph.D. Planning for Effective Team Functioning. Texas: Training & Measurement Systems Corporation; 1977; 18 pp.

Note: Includes Worksheets.

A group exercise to improve team functioning. Process can take place with or without an outside resource person. The team leader role is crucial. The exercise comes with worksheets for group members; five steps include: 1) identifying areas for examination; 2) diagnosing the selected area for functioning; 3) targeting for new ways to function; 4) planning to implement the targets; 5) Evaluating the implementation plan. The Publication consists of two parts: Worksheets containing instructions, team function and diagnostic questions as well as a summary of characteristics of an effective work team, and a Manual for team leaders with procedural and background information.

HRM-Shelf.

EXERCISE/ GNL/ HRM/ ENG/ Team Building/ Staff Development/ Management of Groups/ DOM/ INT/.

27. Baker, Rodney R. Planning for Effective Team Functioning. Houston, Texas: Training and Measurement Systems Corporation; 1977; 17 pp.

The crucial task for a team is to develop its own model of functioning that is compatible with organizational policy and the unique task and resources of the team. This manual comes with instructions and ten worksheets helping teams to work through five steps: 1) identifying areas for examination 2) diagnosing the selected areas of functioning 3) targeting for new ways to function 4) planning to implement the targets 5) Evaluating the implementation plan.

HRM Teambuilding.

EXERCISE/ tool/ manual/ general/ hrm/ eng/ team building/ dom/.

28. Barnes, Louis B. Managing Interpersonal Feedback. Cambridge, MA: Harvard Business School; 1982; 9 pp.

This paper explores the issues that arise in a work environment when people talk about how they feel about each other's work-related behavior. The author discusses techniques and strategies to build a more effective working relationship in the context of performance reviews, informal conversations, team-building exercises, company training programs, critiques of meetings, or planning sessions. Specific techniques are presented with examples of how they might be effectively utilized to improve communications.

HRM-Communication Skills.

READ/ GNL/ HRM/ HRM-2/ ENG/ Personnel management/ Performance appraisal/ Team building/ Management style/ Supervision/ Interpersonal communications/.

29. Baydin, Lynda Diane (Harvard University). Stephen Doyle Case. Cambridge, MA: Harvard University; 1973; 4 pp.

Presented in four parts, this case asks the reader to analyze some problems encountered by the Director of Training in an urban medical center. The problems resulted from a combination of factors including: improper operating procedures; a lack of performance appraisal; poor communications between line staff and supervisors; and the absence of an appropriate monitoring system. While the case focuses on a large medical center, the problems encountered can occur in any level of the health delivery system and the case could be readily adapted to a different setting. The design of this case lends itself to group analysis and discussion.

HRM-Problem Solving.

CASE/ HLTH/ HRM/ HRM-1/ HRM-9/ ENG/ Supervision/ Problem Solving/ Records/ Operating Procedures/ Performance Appraisal/ INT.

30. Beagle, Bernard B. Don't Do It - Delegate It!; April, 1970; 4 pp.

This brief paper discusses the use of delegation as a management technique. The paper includes information on how managers can effectively delegate and the potential benefits to both individuals and the organization. A detailed set of guidelines conclude the reading. Trainers could use this as a background reading or handout for participants, or as a guide in preparing a session on delegation.

HRM-Delegation.

READ/ TOOL/ FP/ HRM/ HRM- / ENG/ Delegation/ Supervision/.

31. Beckhard, Richard. Organization Development: Planned Environment Change: Addison-Wesley Publishing Co.; 1969; 16 pp. In this chapter taken from a text on strategies and models for organizational development, the author begins by developing a definition of organizational development. He examines the characteristics of an effective organization, then looks at the operational goals and the characteristics of organization-development efforts. The chapter concludes with a comparison of organization-development efforts to other planned change efforts such as management development programs, organization wide training efforts, and operations research efforts. This chapter could serve as a background reading on organizational development.

HRM-Organizational Development.

READ/ GNL/ HRM/ HRM-10/ ENG/ Organizational Development/ INT/.

32. Bennis, Warren G. Organizational Development: What It Is And What It Isn't. Reading, MA: Addison-Wesley Publishing Co.; 1969; 17 pp.

This reading begins by presenting five clear and detailed examples that illustrate various elements of organizational development. The illustrations are then used to expand the reader's understanding of what organizational development is. The chapter concludes with a brief discussion of what organizational development is not. While the examples cited are not from the health care arena, the principles they illustrate are relevant and transferrable.

HRM-Organizational Development.

READ/ GNL/ HRM/ HRM-10/ ENG/ Organizational Development/ INT/.

33. Bennison, Malcolm and Jonathan Casson. The Manpower Planning Handbook. United Kingdom: McGraw Hill Book Company Limited; 1984; 314 pp.

This book provides a very detailed and comprehensive description of the various components of manpower planning. It emphasizes a decision-making approach to managing people as a resource, and includes a structured approach to understanding manpower flows within an organization. There are eleven chapters in the books and cases are used as examples throughout the text.

HRM- Shelf.

Read/ Case/ GNL/ HRM/ HRM-7/ ENG/ Manpower Planning/ INT.

34. Berg, David N. (Yale University). Feedback. New Haven, CT: Yale University; 1 pg.

This is a single page on giving feedback to someone in a way that can be the most useful to the recipient. Eight criteria are listed, followed by a brief summary of each point. The format of this sheet makes it a useful tool for discussing feedback and evaluation.

HRM- Performance Appraisal.

Tool/ GNL/ HRM/ HRM-3/ ENG/ Supervision/ Performance Appraisal/ Career Development/ Conflict Resolution/ Negotiation/ Management Style/ INT.

35. Berg, David N. Objectivity and Prejudice. New Haven, Connecticut: Yale University; 15 pp.

This article discusses the nature of prejudice and then looks at some of the effects prejudice can have in the workplace, particularly in the context of performance appraisal. Two brief vignettes illustrate these points. The first shows how the context of the situation can influence one's formulation of beliefs. The second deals with managing prejudice by trying to determine how you "know" something rather than accepting implicit assumptions. Though very specific to the concept of prejudice, the article raises issues that affect human resource management situations.

HRM- Performance Appraisal.

Read/ GNL/ HRM/ HRM-3/ Eng/ Performance Appraisal/ Management Style/ Management in Other Cultures/ INT.

36. Bergthold, Gary. Planificacion Desde la Base en las Zonas Rurales de Ecuador (Planning from a Base in the Rural Zones of Ecuador); 21 pp. (Cases About the Administration of Family Planning Clinics).

The director of Ecuador's Ministry of Health family planning program turns to a consultant to help improve his organization's employee motivation and emotional involvement. The case is based in a real situation and was prepared with the help of Edgar Jacome, the consultant.

HRM - employee motivation.

CASE/ GEN/ FP/ HRM/ HRM - employee motivation/ SPA/ INT/.

37. Bergthold, Gary D., Galo Pozo and Edgar Jacome Salvador. Bottom-Up Planning in Rural Ecuador. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1974; c1977: p203 - p242; 40 pp.

Note: This case is the tenth of twelve located in the Casebook For Family Planning Management.

This case focuses on the role of training as a key management tool for family planning programs. The reader is asked to advise the head of the Ecuadoran Ministry of Health's family planning program on whether a specific training program will improve the performance of clinic personnel. A detailed description of the training program is given, including a narrative tracking a group of trainees through the program and evaluating their performance once back in their work environment. This complex case raises many issues about training design, motivation, supervision, performance appraisal, target setting, objective setting, action steps, and program performance. A study guide precedes the case, posing questions for the reader to consider while reading the case." [A comprehensive analysis follows looking at what actual changes, resulted in the training program] how the training caused these changes, and what problems resulted." Trainers could use this case as the basis for a session on staff development, or training as a component of human resource management.

HRM-Shelf.

CASE/ FP/ HRM/ PLN/ HRM-1/ ENG/ SPA/ In-service Training/ Target Setting/Objectives Setting/ Action Plan/ Performance Appraisal/ Staff Development/Supervision/ Participative Management/ ECU/ LAC/ INT/.

38. Blanchard, Kenneth and Spencer Johnson. The One-Minute Manager. New York: Berkley Books; 1982; 108 pp. Read in under two hours this book is an allegory that presents basic management concepts and techniques. The story reveals reasons that a manager should work with employees to set goals and how to enable employees to meet those goals. Performance appraisal and supervisory techniques are included in the story, providing a concrete background for introducing human resource management. This book could serve as an assignment for participants to read prior to a lecture or group discussion.

HRM- Shelf.

Read/ GNL/ HRM/ HRM-1/ HRM-3/ HRM-9/ ENG/ Management, General/ Management Functions/ Management Style/ Performance Appraisal/ Supervision/ Job Description/ Problem Solving/ Self Management/ BB/ RTI FRE/ INT/.

39. Block, Peter. The Empowered Manager: Positive Political Skills at Work. San Francisco, CA: Jossey-Bass Publishers; c1987; 204 pp. (The Jossey-Bass Management Series); ISBN 1-55542-019-2.

HRM-Shelf.

HRM/ ENG/.

40. Bok, Kim Shin, PhD (Asian and Pacific Development Administration Centre (APDAC)). Personnel Administration for Family Planning Programme Managers. Kuala Lumpur, Malaysia: Asian and Pacific Development Administration Centre; 85 pp. (Family Planning Programme Management Module Series; (Number 7)).

This is a three-unit course on human resource management for family planning program managers. The units are: the development of personnel management, including management functions; recruitment by job analysis; compensation; performance evaluation and career development; and human relations. Each unit has objectives, a self-test and discussion questions, and exercises. This course is designed in a way that in the absence of a group, an individual could work through the materials on their own.

HRM- Management, General.

Course/ FP/ HRM/ HRM-1/ HRM-3/ HRM-9/ Eng/ Management, General/ Management Functions/ Job Description/ Supervision/ Performance Appraisal/ Renumeration Systems/ INT/.

41. Bourgoin, Henry. L'Afrique Malade du Management. 47 rue Auguste-Lancon, 75013 Paris, France: Editions Jean Picollec; 1984; 216 pp; ISEN 2 Volumes.

HRM-Shelf.

HRM/ FRE/ BB/ INT/.

42. Boydell, TOM. Management Self-Development; A Guide for Managers, Organizations and Institutions. Geneva: International Labour Office; c1985; 267 pp. (Management Development Series No. 21); ISBN 92-2-103958-7.

HRM-Shelf.

HRM/ ENG/ INT/.

43. Brinkerhoff, Derick W. and Rosabeth Moss Kanter. Appraising the Performance of Performance Appraisal. Sloan Management Review; Spring, 1980; Volume 21(Number 3): pp 3- 16. This article provides a critical examination of formal performance appraisal systems in organizations. It argues that the role, effectiveness, and validity of appraisal data are limited by a number of organizational factors. The purposes of the appraisal (both avowed and covert), the characteristics of the tasks for which the appraisal is performed, and the location in the structure of the organization of both appraisers and appraisees. The authors conclude that data from formal performance appraisal systems should never be utilized alone and uncritically, without full consideration of the context in which the appraisal is being performed and used.

HRM- Performance Appraisal.

Read/ GNL/ HRM/ HRM-3/ ENG/ Management Functions/ Performance Appraisal/ Management Style/ INT.

44. Brinkerhoff, Derick W. and Janet C. Tuthill. La Gestion Efficace des Projets de Developpement. West Hartford, Connecticut: Kumarian Press; 1987; 185 pp.

Note: This text was written in French and is not a translation. Focusing on developing countries, this manual discusses the theory and techniques for program planning and implementation. The text is divided into four main sections. Part I is an introduction to the manual. Based on an analysis of successful projects, Part II details the project cycle and characteristics of program implementation. At each stage of the cycle the reader is referred to the appropriate section of Part III which contains 12 modules on specific tools and techniques that can be utilized. Part IV discusses evaluation, specifying the need for evaluation and showing the link between evaluation and management emphasizing the impact evaluation can have on decision making.

PLN-Shelf.

READ/ EXER/ TOOL/ MAN/ GNL/ HRM/ M&E/ PLN/ PLN-4/ FRE/ Program planning/ Implementation/ Gantt chart/ MBOR/ Project development/ Needs assessment/ Decision making/ Team building/ Management of groups/ FAF/ HAI/ INT/.

45. Brodeur, Andre. Manuel de Reference et d'instruction pour votre Personnel. Montreal, Canada: Les Editions Agence d'ARC; 1980; ISBN 2-89022-019-2.

HRM-Shelf.

HRM/ FRE/.

46. California Planned Parenthood Affiliates. Job Descriptions; 4 pp.

Two sample job descriptions: The first is for a family planning nurse practitioner; the second is for a community health worker. HRM-Job descriptions.

TOOL/ FP/ HRM/ HRM-2/ ENG/ Job description/ Traditional practitioners/ DOM/ USA.

47. CEDPA. What is Management?/ What Do Managers Do? Washington, DC: CEDPA; Content Session 100; 15 pp.

Note: Course: "What is Management?/ What Do Managers Do?"

This 2 1/2 hour course module focuses on what management is and what it is that managers do. It also includes a brief historical background of management theory in this century. The module includes objectives for the facilitator and the participant, a detailed outline of the session handout materials, and notes for the facilitator. Participants work in groups to develop a definition of management and to explore the functions of management. This could be used to introduce a longer course on management and could be readily adapted to focus on family planning.

HRM- Management, General.

Course/ GNL/ HRM/ HRM-1/ Eng/ Management, General/ Management Functions/ INT.

48. Centre for Management Development. Management Case Book.

Lagos, Nigeria: Centre for Management Development; 1985; 200 pp. Based on real cases from Nigeria, this book focuses on a range of management issues. It contains 37 cases which have been divided into four content areas: general management; personnel management and industrial relations; marketing management; and accounting and financial management. Each case is accompanied by discussion questions. None of the cases included are based in a health care setting, but some of the issues raised are applicable and can be adapted.

HRM- Shelf.

Case/ GNL/ HRM/ FIN/ HRM-1/ HRM-2/ HRM-3/ HRM-4/ HRM-9/ FIN-4/ Eng/ Management, General/ Supervision/ Organizational Development/ Financial Planning and Management/ INT/ NIR.

49. Chambers, Richard. Managing Rural Development: Ideas and Experience from East Africa. West Hartford, CT: Kumarian Press; 1985; 216 pp.

Using examples from East Africa, the author explains how management procedures applicable to development settings throughout the world are fundamental to solving the problems of delivering project benefits to the rural population. Written in clear language, the book contains chapters on the following: the impetus for rural development; program planning and implementation; management of evaluation. The thrust is the book is careful realistic planning as an essential element of program success. This could be used as a background reading or as a resource for participants to have in their own library.

PLN-Shelf.

READ/ GNL/ PLN/ HRM/ Program planning/ Implementation/
Supervision/ Work plan/ Community participation/ Community
survey/ INT/ AFR.

50. Chamnong, Vudhichai. Coordination In The Implementation Of Family Planning Programs. Kuala Lumpur, Malaysia: Asian and Pacific Development Administration Centre; 91 pp. (Family Planning Programme Management Module Series; Number 4).

This module contains four units on coordinating the implementation of family planning programs. The modules are designed to provide participants with the skills to analyze the complex problems of interpersonal, interunit, and inter-organizational relations, and to be able to develop and apply strategic means to increase the potential of coordination between and among organizational units and organizations. The units are titled as follows: 1) Basic Concepts of Coordination; 2) Analysing the Task Environment; 3) Toward Communication Strategies; and 4) Human Relations Skills in Coordination. Each unit contains objectives, questions and exercises.

HRM-Coordination.

COURSE/ FP/ HRM/ PLN-5/ HRM-1/ HRM-10/ ENG/ Implementation/
Family Planning Programs/ Situational Analysis/ Organizational
Development/ Coordination/ INT/.

51. Chamorro C., Edgar, John C. Ickis and Gary D. Bergthold. The Banderas MCH/FP Program. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1976; c1977: p243 - p264; 22 pp.

Note: This case is the eleventh of twelve case located in the Casebook For Family Planning Management.

"This case focuses on the supervisory process in a national integrated maternal and child health and family planning program in Latin America. The program director is overwhelmed by the paperwork generated by clinic visits of his supervisors and seeks assistance in deciding what to do about it." The reader is asked to determine if the problem is supervisory or one resulting from inappropriate organizational design. In addition, the reader is asked to "develop two different sets of recommendations: 1) a set of recommendations that could improve the supervision within the existing supervisory structure, and 2) a set of recommendations for changing the supervisory structure to better support effective program performance." Trainers could use this case as the basis for a group exercise or an individual assignment, or as a component of a unit focusing on supervision and organizational design.

HRM-Shelf.

CASE/ FP/ HRM/ HRM-10/ ENG/ SPA/ Organizational Design/
Organizational Development/ Supervision/ INT/ LAC/.

52. Chamorro, Edgar. Programa de Salud Materno-Infantil de Banderas (Banderas' Maternal and Infant Health Program): INCAE, reproduction prohibited.; 1974; 17 pp.
The article is a case dealing with a fictional Central American country. It addresses human resource management problems in a maternal and child health program.
HRM - human resource management.
CASE/ FP/ GEN/ HRM/ SPA/ INT/ HRM - human resource management/.
53. Cinnamon, Kenneth M. Ph.D.; Norman J. Matulef, Ph.D. Effective Supervision: Applied Skills Training Series. San Diego, CA: Applied Skills Press; 1979; 134 pp.
HRM-Shelf.
HRM/ TOOL/ ENG/ Supervision/.
54. Claux, Roger; Arthur Gelin. Systemique et resolution de problemes: Selon la methode des systemes souples. Montreal, Canada: Les Editions Agence d'ARC; 1982; ISBN 2-89022-053-2.
Note: Dans la Serie - Pour un renouvellement de la systemique: systemes souples, changement emergent et recherche-action.
HRM-Shelf.
HRM/ FRE/.
55. Clifford, Donald K., Jr. Growth Pains of the Threshold Company. Harvard Business Review; Sept-Oct 1973; 51(5): p. 143.
Organizational changes in large companies: economic and management challenges for the Chief Executive. Although written for the U.S. "about to become Fortune 500 companies" some of the issues are generic and may be useful reading for top level ministry officials.
Organizational development.
READ/ GENERAL/ HRM/ ENG/ ORGANIZATIONAL DEVELOPMENT/ MANAGEMENT/ STRATEGIC PLANNING/ DOM/.
56. Collerette, Pierre et G. Delisle. Le Changement Planifie. 2 ed. 6872 est, rue Jarry, Montreal, Quebec H1P 3C1, Canada: Les Editions Agence d'ARC Inc.; 1982; 211 pp.
This book focuses on the dynamics of change within an organization. The authors present methodologies and techniques for planned and effective change. Among the topics discussed are: planned change; formation of attitudes; force field analysis; the objectives of change or intervention; resistance to change; strategic choices; and the actors in a strategy for change. Each chapter contains review questions to assist the reader.
HRM--Shelf.
READ/ GNL/ HRM/ PLN/ HRM-4/HRM-10/ FRE/ Organizational Development/ Management of Change/ Resistance to Change/ BB/ INT/.

57. Cribbin, James J. Leadership. New York, NY: AMACOM; 1981; 296 pp.

This book is designed to help individuals develop leadership skills and incorporate strategies to improve organizational effectiveness. The author supplements the narrative with a number of individual exercises that facilitate organizational analysis. Discussions on leadership focus on: communication patterns; management of groups; conflict resolution; and problem solving. The exercises could be used by trainers as part of a session on leadership style, organizational diagnosis and development, or group management.

HRM-shelf.

Read/ Tool/ Exer/ GNL/ HRM/ HRM-1/ HRM-9/ HRM-10/ ENG/
Interpersonal communications/ Management of groups/ Conflict
resolution/ Problem solving/ Organizational diagnosis/ Management
style/ INT.

58. Dann, William. The Role of the Health Care Manager; 11 pp.
This clearly written piece focuses on what the role of a health care manager is and how that is distinguished from performing technical work. Using basic terms and language, the author defines the four major components of management work as planning, organizing, leading and controlling. A detailed description is provided for each of these management functions, in addition to a summary of how skillful utilization of these functions can enhance effectiveness in the management role. This reading could be used as a reading to introduce management concepts in a health care setting and could be readily adapted to the specific demands of family planning program management.

HRM- Management, General.

Read/ Hlth/ HRM/ HRM-1/ ENG/ Management, General/ Management
Functions/ Management Style/ INT.

59. David Clutterbuck. The Whittling Away of Middle Management.
The Best of Business: A Semiannual Collection of Outstanding
Business Articles; Spring 1983; 5, No. 1: pp44-64.

HRM-Shelf.

HRM/ ENG/ INT/.

60. Davis, Stanley M. La Sucesion Empresarial (Entrepreneurial
Succession); 29 pp. (Latin-American Sociology Magazine; 68; (1)).
Discusses how to deal with the succession of new executives in a
firm or organization, with emphasis on inter-familial inheritance
and its various forms and specific problems.

HRM -.

TOOL/ GEN/ HRM/ SPA/ INT/ HRM/.

51. de Bernard, Carmen, and David C. Korten. The Model Clinic. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1973; c1977: p183 - p202; 20 pp.

Note: This case is the ninth of twelve located in the Casebook For Family Planning Management.

In this case the executive director for the Fund for Family Planning Activities (FFPA), a private international family planning funding organization, must make a recommendation to the Board as to whether or not to fund a model clinic to serve as a training program. In the fictitious Latin American country two groups are involved with providing family planning. The Ministry of Health is the primary channel for the delivery of family planning services, and the Veruguan Demographic Association (VDA) is a private family planning organization. The activities of each organization are described, followed by a discussion of the need for training. The reader is asked to assume the role of the executive director of the FFPA and to try and weigh the options for an effective training program. The casebook introduces the topic of training with a description of the principles that should be applied in designing a training program. A study guide precedes the actual case, providing readers with a framework to consider the case and on which to base recommendations. The analysis thoroughly dissects the case raising important points that must be assessed when designing any training programs. Trainers could use this case to illustrate the need for carefully constructed training programs and as the basis for discussion on the various objectives served by training.

HRM-Shelf.

CASE/ FP/ HRM/ PLN/ TOT/ HRM-5/ TOT-2/ ENG/ SPA/ Program Planning/ In-service Training/ Staff development/ Teaching Methodologies/ LAC/ INT/.

62. De Jesus, Edilberto C. (Don Andres Professor of Business Management). Davao Del Sur POPCOM-PROCOP Outreach Program. Manila, Philippines: Asian Institute of Management; 1978; 27 pp.

Note: This case is contained in the AIM Casebook.

A range of project management issues are the subject of this case on a population outreach program in the Philippines. The outreach program is described including a discussion of some of the barriers to program success. Trainers might be able to use this to provide an overview of some of the issues an outreach program manager might face and how they can be addressed.

PLN-Shelf.

CASE/ FP/ HRM/ PLN/ PLN-5/ ENG/ Program Planning/ Volunteers/ Organizational Design/ PHI/ INT/.

63. Demory, Bernard. Comment Animer les Reunions de Travail en 60 Questions. Montreal, Canada: Les Editions Agence d'ARC; 1987; ISBN 2-7127-0093-7.

HRM-Shelf.

HRM/ FRE/.

64. Department of Health and Social Security. Nurse Manpower - Maintaining the Balance. Heywood, Lancs OL10 2PZ: DHSS; 1982; 103 pp.

HRM-Shelf.

HRM/ ENG/.

65. Department of Health and Social Security, Operational Research Service. Nurse Manpower - Planning: Approaches and Techniques. London: Her Majesty's Stationery Office; 1983; 90 pp.

HRM-Shelf.

HRM/ ENG/.

66. Direccion por Objetivos - Algunas Consideraciones de Procedimiento (Administration by Objective - Some Considerations About Procedure): INCAE, Distribution restricted.; 15 pp.

In outline form this article says that an employee will only be capable of self-direction to the extent that they understand and are committed to the objectives of the organization. Once this is achieved stabilization of objectives, direct action and evaluation complete the procedure (administration by objective).

PLN - strategic planning, HRM - administration by objective.

TOOL/ GEN/ HRM/ PLN/ SPA/ INT/.

67. Duncan, Robert. What Is the Right Organization Structure?; 1979; 21 pp.

This article discusses the purpose of organizational structure and presents an analytical "decision tree" model to help managers select the right organizational structure. The author discusses the following: objectives of organizational design; design options; the interaction between organizational environment design; strategies for design; and symptoms of an inappropriate organizational structure. This is a detailed reading that might be used by trainers in preparing for a discussion of this subject.

HRM-Organizational Design.

READ/ GNL/ HRM/ HRM-10/ ENG/ Organizational Development/ Organizational Design/ INT.

68. The Economics Press. Bits and Pieces: A Monthly Mixture of Horse Sense and Common Sense about Working With People.

Fairfield, NJ: The Economics Press; 24 pp. (Vol.D/No.4G).

HRM-Shelf.

HRM/ ENG/.

69. Edgar, Chamorro C.. Chamorro, Edgar. Programa de Salud Materno-Infantil de Banderas (Banderas' Maternal Infant Health Program): INCAE; 1974; 17 pp.

The article is a case dealing with a fictional Central American country. It addresses human resource management problems in a maternal and child health program.

HRM - Human Resource Management.

CASE/ HLTH/ HRM/ SPA/ human resource management/ MCH/ INI/.

70. El papel del Administrador (The Role of the Administrator): Pathfinder Foundation; 1977; 2 pp. (Administration of Family Planning Programs, Francis & Korten).

The importance of the administrator in maintaining the effectiveness of a family planning clinic.

HRM.

TOOL/ GEN/ FP/ HRM/ SPA/ administration/ INT/.

71. Esamah, Willie. Personnel Management. Lagos, Nigeria: Hal Publications; 1985; 111 pp.

This book was designed for use in personnel management courses and to serve as a reference. It is divided into two parts. Part A is a guide to the case study approach. Part B is a compilation of short cases focusing on various aspects of personnel management. Topics covered by the cases include the following: recruitment "selection"; training and development; employee welfare; promotion; performance appraisal; negotiation; conflict resolution; and general personnel management. Questions are included with each case and could serve as the basis for group discussion for a prepared assignment. Although the cases do not have a health emphasis, they do present these issues of personnel management in a Nigerian context, which may be useful to trainers.

HRM- Shelf.

Read/ Case/ GNL/ HRM/ HRM-1/ HRM-3/ HRM-5/ HRM-9/ Eng/ Management, General/ Performance Appraisal/ Conflict Resolution/ Personnel Recruitment/ Personnel Selection/ In-Service Training/ Career Development/ INT/ NIR.

72. (Alan Guttmacher Institute). Family Planning Perspectives; 1986-.

Published bimonthly by the Alan Guttmacher Institute, this journal contains articles and special reports on domestic family planning topics.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS/ M&E/ FIN/ IE&C/ INT/.

73. Feder, Gershon, Lawrence J. Jau and Roger H. Slade. The Impact of Agricultural Extension: A Case Study of the Training and Visits System in Haryana, India. Washington, D.C.: The World Bank; 1985; 96 pp.

Note: World Bank Staff Working Papers Number 756.

HRM-Shelf.

HRM/ ENG/.

74. Fetteroll, Eugene C. A Continuous Thread - Performance Appraisal As A Tapestry; 2 pp.

Providing an in depth look at performance appraisal, this two page paper discusses the methodology and the content of an effective performance appraisal. The author discusses different approaches to the process, expressing his ideas on the possible pitfalls and merits of each approach. Four major areas are cited as essential elements to the appraisal discussion. Trainers could provide this as a handout for any session on supervision. HRM-Performance Appraisal.

READ/ TOOL/ GNL/ HRM/ HRM-3/ HRM-9/ ENG/ Performance Appraisal/ Supervision/ INT/.

75. Fetteroll, Eugene C. Seven Steps To Better Meetings; 4 pp.

This includes seven tips to help design and facilitate effective and productive meetings. Each step is discussed in detail, using brief illustrations to highlight the authors main points.

Trainers could distribute this reading as a handout for a session that focuses on conducting meetings.

HRM-Meetings.

READ/ TOOL/ GNL/ HRM/ HRM-1/ ENG/ Management of Groups/ INT/.

76. Finkle, Jason L. and Gayl D. Ness. Final Report - Managing Delivery Systems - Identifying Leverage Points for Improving Family Planning Program Performance; December 28, 1985; 150 pp. This is a final report on a project entitled "Managing Delivery Systems" and is concerned with improving program performance by focusing on managerial issues in the program. The report contains sections on the following five areas: program structure and character; problem solving modes; management styles; management tasks; and, contraceptive method mix. Each section provides a problem oriented analysis of family planning programs that focuses on the impact of management on program performance. Illustrations from existing family planning programs highlight a variety of issues and indicate some management successes and failures. Special attention was given to programs in India, Pakistan, Indonesia, Egypt, Jamaica, as a result of field interviews and discussions with managers of these programs, and studies and surveys, conducted by the project. At the conclusion of each section, are a series of suggestions that could be undertaken to improve program performance, While not necessarily universally applicable, they touch very clearly on the areas that have a significant impact on program success. For example, in the section on program structure, there is a detailed presentation of how political support can affect program success. In addition to the 5 sections, the report also contains two appendices. The first is entitled, "Management in FP Programs - Literature, Concepts and Research Agenda". Appendix B reports on the results of the project survey and is entitled "Managers' Perceptions of Management Issues. A sample of the survey used is attached. This is a comprehensive report that addresses the following issues relevant to mid and senior level managers of family planning programs: political environment; centralized

versus decentralized programs; integration of FP programs; management functions; and, management style. Written with a sensitivity to the cultural and religious issues that may pertain to individual countries, this could be used by trainers as a background reading. It is possible to select specific sections, or the entire report could be used. Note: An abstract of Appendix A is listed separately- author Jason L. Finkle, et al.
HRM-Shelf.

READ/ TOOL/ FP/ HRM/ POL/ HRM-1/ HRM-9/ POL-3/ ENG/ Policy Environment/ PoliticalSupport/ Integrated Programs/ Vertical Programs/ Management Style/ Self Management/ Decentralization/ Management Functions/Supervision/ Cross Cultural Management/ Operations Research/ IDI/ IND/ PAK/ EGY/ JAC/ INT/.

77. Finkle, Jason L., Gayl D. Ness, and Ruth Simmons. Management in Family Planning Programs Literature, Concepts and Research Agenda. Center for Population Planning, University of Michigan: Ann Arbor; 8 June 1984; 45 pp.

Note: 2 copies.

This is a comprehensive overview of family planning program management. The authors identify three arenas for family planning management as: program management; resource mobilization; and the population served by the program. The functions of management are then described as: planning; organizing; staffing; directing; and controlling. There is a discussion of each topic listed above which includes a review of the pertinent literature. An agenda for further research in the field concludes the article. The material is written in such a way that it forms a matrix for the various components of management. In addition to HRM, this could be used as a general introduction to many aspects of family planning program management, including policy, financial management, and logistics. NB:This report is also included in a Final Report on Managing Delivery Systems - Identifying Leverage Points for Improving Family Planning Program Performance. This report is also indexed under the author's name, Jason L. Finkle.
HRM- Management, General.

Read/ FP/ HRM/ FIN/ POL/ HRM-1/ HRM-9/ Eng/ Management, General/ Management Style/ Self-Management/ Supervision/ Policy Environment/ Resource Development/ INT/.

78. Fisher, Roger, William Ury. Getting to Yes: Negotiating Agreement Without Giving In. Boston, MA: Houghton Mifflin Company; 1981; 163.

This book presents a practical methodology for resolving conflict and disagreement. It covers all aspects of negotiations clearly and thoroughly and is designed to enable the reader to improve their negotiating skills.

HRM- Shelf.

READ/ GNL/ HRM/ HRM-/ ENG/ Conflict resolution/ Interpersonal communications/ Problem solving/ Negotiation/ Supervision/ INT.

79. Foreit, James R., Karen G. Foreit. Quarterly Versus Monthly Supervision of CBD Family Planning Programs: An Experimental Study in Northeast Brazil. Studies in Family Planning; 1984; Vol. 15(No. 3): pp. 112-120.

Reports on a study undertaken in Brazil to compare quarterly versus monthly supervision of CBD Family Planning Programs. The rationale for the study is presented, followed by the methodology and the results are then used to formulate projected costs and savings for quarterly supervision illustrating the use of cost analysis in management and program decisions. The report concludes with a discussion of how the findings of the study might be used to make operating decisions for programs.

HRM-Supervision.

READ/ FP/ HRM/ HRM-8/ HRM-9/ ENG/ CBD programs/ Supervision/ Cost analysis/ Organizational design/ Organization diagnosis/ INT/ BRA.

80. Fox, William M. Effective Group Problem Solving: How to Broaden Participation, Improve Decision Making, and Increase Commitment to Action. San Francisco, CA: Jossey-Bass Publishers; c1987; 204 pp. (The Jossey-Bass Management Series and THE Jossey-Bass Social and Behavioral Science Series); ISBN 1-55542-033-8.

HRM-Shelf.

HRM/ ENG/.

81. Fulop, Tamas, Milton I. Roemer. International Development of Health Manpower: Policy. 1 ed. Geneva Switzerland: World Health Organization; 1982; 168 pp.

This publication documents three decades of work in the development of health manpower policies around the world. The report identifies the main policies and objectives in the WHO program of health manpower development between 1948 and 1980, and the factors influencing or determining these policies. The report also tries to determine how development in WHO member states could be correlated with health manpower development policies and programs at WHO. The report closes with conclusions for formulating future policies and programs within WHO. The report also includes a section on the experiences of selected countries - Ethiopia, Indonesia, Malaysia, Gabon, Costa Rica, and Barbados.

HRM-Shelf.

READ/ HLTH/ HRM/ HRM-7/ ENG/ Manpower planning/ Manpower supply/ Staff development/ Manpower distribution/ Manpower requirements/ Manpower projections/ INT/ MAY/ ETH/ GAB/ IND/ COS/ BAR/.

82. Gabarro, John J. Understanding Communications in One-to-One Relationships. Cambridge, Massachusetts: Harvard Business School; 1975; 10 pp.

This article explores the dimensions of interpersonal communications. It begins by recounting an exchange between a supervisor and an employee and uses this to illustrate how problems can occur in communicating. Following the analysis, is a section that focuses on strategies and attitudes that can help in preventing and anticipating communication problems. This could be used as a background reading on communication skills.

HRM-Communication Skills.
READ/ GNL/ HRM/ HRM-2/ ENG/ Interpersonal communications/ INT.

83. Gael, Sidney. Job Analysis: A Guide to Assessing Work Activities. 2 ed. San Francisco, CA: Jossey-Bass Inc., Publishers; 1984; 282 pp.

In this book, the author presents a complete step by step guide to conducting a job analysis project. He details each phase of its planning, coordination, and management from start to finish. The process is spelled out clearly and the author assumes no previous experience. The author also provides a short cut version of job analysis to be used by small organizations or organizations with limited funds. Included is a section presenting detailed computer procedures for use in the analysis.

HRM-Shelf.
Read/ GNL/ HRM/ HRM-2/ ENG/ Job description/ PERSONNEL PROCEDURES/ INT.

84. George, A. The President and His Advisers: Structure, Internal Processes, and Management of Small Groups; 27 pp. This chapter examines a number of ways in which group decision-making behavior can be influenced by social structure variables. The variables discussed are: group size; membership composition; internal role structure; group cohesion and conformity; the nature of the tasks involved; decision rules and group norms; and leadership and management styles.

HRM-Management of Groups.
READ/ GNL/ HRM/ HRM-1/ ENG/ Management of Groups/ INT.

85. Gormley, Wilma and Fred Rosensweig. Facilitator Guide for Conducting A Team Planning Meeting. Washington, DC: Agency for International Development; November 1985; Wash Technical Report No. 32; 48 pp.

Note: 2 copies.

This is a guide to conducting a team planning meeting. Written primarily for preparing short-term technical assistance teams to embark on an overseas project, the manual contains concepts and guidelines that could be applied in other settings. The manual is divided into two sections. Section One focuses on the team planning concept, the design and scheduling of a meeting, and the role of the facilitator. The second section contains step by step procedures for conducting each component of the meeting.

HRM- Meetings.

Manual/ Hlth/ HRM/ HRM-1/ Eng/ Management Functions/ Management of Groups/ INT.

86. Government of Iran. Hiring and Firing Family Planning Field Workers; 6 pp.

Basic information for the experienced manager on selection, target setting, compensation, monitoring and training of family planning field workers. Includes parameters that are probably specific for Iran but can be used as ballpark figures for other countries.

HRM-Staff Development - In Service Training.

TOOL/ FP/ HRM/ HRM-2/ HRM-5/ ENG/ Personnel Selection/ Remuneration/ In-Service Training/ Field Workers/ Course Design/ Client Records/ IRAN/ INT/.

87. Gray-Lucas, Peter; Betty Gray-Lucas (International Planned Parenthood Federation). The Functions of an FPA Board and It's Committees: A Management Handbook. 2nd ed. London, England: IPPF; 1978; 90 pp.

HRM-Shelf.

HRM/ ENG/.

88. Greiner, Larry E. Evolution and revolution as organizations grow. Harvard Business Review; July-August 1972; 50(4): 37-46. Describes five stages in an organization's growth. Each stage consists of a relatively calm period of growth that ends in a management crisis. Each stage is strongly influenced by the previous one so that management with a sense of its own history can anticipate and prepare for the next development crisis. This article provides a prescription for appropriate management action in each of the five phases and shows how organizations can turn these developmental crises into opportunities for growth (handout for top level executives).

HRM-Organizational Development.

READ/ GNL/ HRM/ ENG/ organizational development/ organizational diagnosis/ DOM.

89. Greiner, Larry E. Evolution and Revolution as Organizations Grow. Harvard Business Review; July-August 1972; 50(4).

Note: Handout for high-level executives.

Describes five stages in an organization's growth. Each stage consists of a relatively calm period of growth that ends in a management crisis. Each stage is strongly influenced by the previous one so that management with a sense of its own organization's history can anticipate and prepare for the next developmental crisis. This article provides a prescription for appropriate management in each of the five phases and shows how organizations can turn their developmental crises into opportunities for growth.

HRM: organizational development.

READ/ GENERAL/ HRM/ ENG/ ORGANIZATIONAL DEVELOPMENT/ ORGANIZATIONAL DIAGNOSIS/ DOM.

90. Hackman, Richard (Harvard). Signs of Effective Self-Management; 1 pp.

Note: 1 copy.

The questions posed on this single page handout, are a quick assessment tool for managers. It can be used to determine how successful a manager is in encouraging and supporting self-management in those he or she manages. NB: There is a second training handout on things managers can do to foster self-management.

HRM-Self management.

TOOL/ GNL/ HRM/ HRM-3/ HRM-9/ ENG/ Self management/ Management, general/ INT.

91. Hackman, Richard (Harvard). Thing's Managers Can Do To Foster Self-Management; 1 pp.

Note: 2 copies.

Single page handout that details some strategies that managers can employ to increase the level of self-management, and the performance effectiveness of those they manage. NB: There is another handout on the signs of effective self-management.

HRM-Self management.

TOOL/ GNL/ HRM/ HRM-1/ HRM-3/ HRM-9/ ENG/ Management function/ Self management/ Performance appraisal/ INT.

92. Hall, Edward T. and William Foote Whyte. Intercultural Communication: A Guide to Men of Action. Human Organization 19; 1960; 1: 5-12.

Note: There is a page missing from this article.

This article includes numerous examples of how culturally determined our ways of communication are. There are a number of examples from around the world cited in the article. This could be used as a reading for a session on cross cultural communication. It is primarily intended for those individuals who work in a culture other than their own.

HRM- Management, General.

READ/ GNL/ HRM/ HRM-9/ ENG/ Interpersonal communications/ Cross cultural management/ INT/.

93. Harlan, Anne and John J. Gabarro. Note on Process Observation. Cambridge, MA: Harvard Business School; 1976; 477-029; 6 pp.

This paper covers seven important aspects of group process that can influence group effectiveness. They are described as: participation; influence; group climate; membership; feelings; task functions; and maintenance functions. For each of these aspects the authors suggest interventions to facilitate the group process and to keep the group focused.

HRM- Management of Groups.

Read/ GNL/ HRM/ HRM-1/ Eng/ Management of Groups/ Management Style/ INT.

94. Hatcher M.D., Robert A. Contraceptive Technology: International Edition. Atlanta, Georgia: Printed Matter, Inc.; 1989; 460 pp.

"This international edition of "Contraceptive Technology" provides contraceptive and reproductive health information that is timely, thorough, intellectually honest and practical. It is intended as a reference for the providers of family planning information and services... [The book] examines the benefits and practices of family planning around the world. The book is divided into sections that explore the status of family planning in international societies, update the management of sexually transmitted diseases including human immunodeficiency virus (AIDS), describe the selection and administration of the contraceptive methods, and offer guidelines for managing family planning services." It is an essential resource for anyone involved in the management and delivery of family planning services.

Shelf-Ref.

READ/ FP/ HRM/ PLN/ IE&C/ ENG/ Family Planning/ AIDS/ Maternal & child health/ Infant mortality/ Child mortality/ Maternal mortality/ Women's rights/ Service delivery systems/ Clinic based delivery systems/ CBD programs/ Family planning programs/ Integrated programs/ Vertical family planning programs/ Contraceptive supplies/ Condom/ IUD/ Implants/ Injectables/ Oral contraceptives/ Spermicides/ Contraceptive technology/ NFP/ Health benefits of family planning/ Infertility/ STD/ Child survival/ Nutrition/ Family planning personnel/ FP counselors/ FP instructors/ Physicians/ Nurses/ Nurse midwives/ INT/ BB2.

95. Heaver, Richard. Adapting the Training and Visit System for Family Planning, Health and Nutrition Programs. Washington, D.C.: The World Bank; 1984; 56 pp. (World Bank Staff Working Papers No. 662).

HRM-Shelf.

HRM/ ENG/ INT/.

96. Hellriegel, Don; John W. Slocum, Jr. Management. 4 ed. Reading, MA: Addison-Wesley Publishing; August 1986; c1986; 796 pp; ISBN 0-201-11542-5.

HRM-Shelf.

HRM/ ENG/.

97. Hersey, Paul and Ken Blanchard (The Center for Leadership Studies). Situational Leadership. San Diego, California: University Associates, Inc.; 1983; 10 pp.

Note: This is also available in French.

This package includes a reading on situational leadership and an exercise to perform an analysis of individual leadership styles. The reading explains "basic concepts, different leadership styles, and levels of leadership and the maturity of those being led." Included, is a resource guide that details other training materials available on situational leadership.

HRM-Management Style.

TOOL/ READ/ EXER/ GNL/ HRM/ HRM-9/ ENG/ FRE/ Management style/
INT/.

98. Harnby, P., F.J. Shipp, D. R. Roy, and T.D. Hall. Guidelines for Health Manpower Planning. World Health Organization: Geneva; 1980; 368 pp.

Note: One copy in English, one copy in French.

Six day course, consisting of twelve sessions that address the various issues surrounding health manpower planning. The course is designed to cover the principle methods and uses of manpower planning and provide participants with the tools necessary to direct and monitor the activities of a manpower planning team. The course includes sessions on supply and demand and how to resolve mismatches, as well as teaching participants how to specify the information needed for manpower planning calculations and how to perform these calculations. The course emphasizes group work and includes evaluation questionnaires for each session and exercises for practicing skills.

HRM- Shelf.

Exer/ Course/ HLTH/ HRM/ HRM-7/ ENG/ FRE/ Manpower planning/
Manpower projections/ Manpower requirements/ Manpower supply/
Manpower distribution/ INT.

99. Ickis, John. El Seguro Social de Cartagua (Cartagua's Social Security): INCAE, reproduction prohibited.; 1973; 24 pp.
The newly appointed head of the family planning section of the social security system in a pseudonymous Central American country attempts to improve the program.

PLN -.

CASE/ FP/ HRM/ PLN/ SPA/ INT/.

100. Ickis, John. Oficina Regional de Cabuya (The Cabuya Regional Office): INCAE; 5 pp.

Note: Trans Olympia Nunez de Vivas, INCAE.

The appointment of a new administrator of a regional office of the Ministry of Agriculture without consulting the social workers provokes employee dissent.

HRM - human resource management.

CASE/ GEN/ HRM/ SPA/ human resource management/ INT/.

101. Ickis, John. San Miguelito II; 23 pp.

A year later the mayor must deal with funds that are drying up, the need for a competent staff, drawing up a municipal budget, the need for urban development and coordinating the system for dependents of the state.

HRM -.

CASE/ GEN/ HRM/ POL/ SPA/ INT/.

102. Ickis, John. San Miguelito III; 17 pp.
San Miguelito is presented as a model city to the foreign press during the forced "11 de Octubre" celebrations but has difficulties with government backlash over the limited autonomy San Miguelito is granted as the result of being declared a model.
HRM -.
CASE/ GEN/ HRM/ POL/ SPA/ INT/.

103. Ickis, John. San Miguelito IV; 4 pp.
The city and federal government must deal with the unexpected resignation of the new mayor and his controversial appointment of a successor.
HRM.
CASE/ GEN/ HRM/ POL/ SPA/ INT/.

104. Ickis, John C. (INCAE). Clinica Santa Maria. Boston, Massachusetts: The Pathfinder Fund; 1973; 9 pp.
Note: 2 copies. This case is also the eighth of twelve located in the Casebook For Family Planning Management and includes a section on analysis and concepts.
This case describes a family planning program that is being transferred from a private family planning association to the government's Ministry of Public Health. As a result, program operations will change affecting the way in which the supervisor performs his role. The case compares the two systems in each of the following areas: selection and compensation; supervision; clinic organization; opportunities for professional growth; administrative support; and decision making. The reader is asked to note the specific differences in program operations which will affect the doctor's motivation and to determine which conditions could be improved by effective leadership within the Ministries. Included with the case are a study guide and an analysis.
HRM-Supervision.
CASE/ FP/ HRM/ HRM-9/ ENG/ FRE/ SPA/ Supervision/ Organizational Design/ Decentralization/ Personnel Recruitment/ INT.

105. Ickis, John C. (INCAE). Community Distribution Reports (A and B). Alajuela, Costa Rica; 1986; A-9, B-12 pp.
In these complementary cases, the focus is on the use of data to evaluate a community based distribution program in Latin America. The project supervisor is "responsible for analyzing the plans and reports submitted by the five community workers who report to her, identifying problems in achieving goals and objectives, and taking the remedial actions she deemed necessary." In Case A the supervisor receives a report from one of the community workers that includes seven tables that summarize the data collected by the worker. Trainers could develop a role play with a dialogue between the supervisor and the community worker on the content of the report and the reporting system. In Case B, the project supervisor wants to use the reports of the evaluation section to determine the successes and problems in the provinces she is responsible for, and to try and assess the relationship between promotional activities and contraceptive sales. The tables and

reports prepared by the community worker and the evaluation section, are provided for analysis. Trainers could use this to discuss supervision issues in CBD projects and data collection, including the type of data collected, how it is recorded and reported, and its utility in project evaluation. Participants could be asked to prepare a written analysis of the data contained in Case B or to participate in a classroom discussion.

MIS-CBD Records.
CASE/ FP/ PLN/ HRM/ MIS/ HRM-9/ MIS-6/ MIS-2/ ENG/ Supervision/
Logistics/CBD Programs/ Program Monitoring Systems/
Implementation/ Objective Setting/ LAA/ INT/.

106. Ickis, John C., and Austin, James. El Comité Técnico de Población: Ejecutando la Política Integral de Población de El Salvador (The Technical Population Committee: Executing the Population Policy of El Salvador); 4 pp.

A continuation of the above mentioned case study in which the members of the committee attempt to deal with the problems of their growing responsibilities.

POL - population policy.

CASE/ FP/ POL/ HRM/ SPA/ INT/ population policy/.

107. Ickis, John C. The Quarterly Count: Administrative Supervision in Community Distribution Program. Boston, MA: FPMT; 1987; 6 pp.

Using a contraceptive community distribution program in Latin America as the basis for this case, the author examines the multiple facets of data collection. On a quarterly visit to a distributor in the program, the promoter discovers some discrepancies in the data collected during the previous quarter. Issues raised by the case include: the role of the supervisor in data collection; inventory control; user follow-up; and, data collection forms. Trainers could discuss how reporting can be used as a supervision tool as well as the techniques used for data collection and reporting.

MIS-Data Collection.

CASE/ FP/ MIS/ HRM/ LOG/ MIS-6/ LOG-5/ HRM-9/ ENG/ Supervision/
Inventory Management/ Data Collection/ Records/ Client Records/
Inventory Records/ LAA/ INT/.

108. Ickis, John C. San Miguelito: INCAE; 1972; 43 pp.

Note: Prepared under David Korten. Revised November 1972.

A man with no previous political experience is made mayor of a newly created municipal district and must create an administrative organization to manage the town.

HRM - political management.

Case/ GEN/ HRM/ POL/ SPA/ INT/ political management/.

109. Ickis, John C. A Supervisor for the Eastern Zone. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1974; c1977: p157 - p168; 12 pp.

Note: This case is the seventh of twelve located in the Casebook For Family Planning Management.

"This short and concise case poses the problem of choosing between two candidates for the position of maternal and child health supervisor" for thirty one rural health units in a central American country. The MCH Director for the country has interviewed both candidates and during the interview each has conveyed his ideas on the role of a supervisor. Based on the background information on the program and the position, and the opinions expressed by each candidate during the interview, the reader is asked to assume the role of the MCH Director and select the better candidate, and to defend his/her selection. The study guide at the beginning of the case provides a list of questions the reader should consider when weighing the selection. In the analysis that follows the case, there is a discussion of some of the characteristics of an effective supervisor, an analysis of the positions stated by each candidate during his interview, and a summary of some of the reasons that less effective individuals often hold supervisory positions. Trainers could use this case as the basis for a comprehensive discussion on supervision.

HRM-Shelf.

CASE/ FP/ HRM/ HRM-9/ ENG/ SPA/ Supervision/ Personnel Recruitment/ LAC/ INT/.

110. Indian Institute of Management (Public Systems Group). Experiments in Management Development: Experience of India Population Project-1. Ahmedabad: IIM; January 1981; 131 pp.

HRM-Shelf.

HRM/ ENG/.

111. Indian Institute of Management (Population Project Unit). Management Development Training Programme for District Medical Officers. Ahmedabad: IIM; April 22-29, 1977.

HRM-Shelf.

HRM/ ENG/.

112. Interaction Management. Delegating Responsibility. 2 ed. Pittsburgh, PA: Development Dimensions International; 1979; 14 pp.

A complete module on delegation for 3 1/2 hour session. Includes complete teaching guide and sample role plays.

HRM-Delegation.

TOOL/ COURSE/ ROLE PLAY/ GNL/ HRM/ HRM-1/ ENG/ Management style/ Supervision/ DOM.

113. International Center for Public Enterprises in Developing Countries. Guide to Planning for Manpower Development. Ljubljana, Yugoslavia: ICPE; 1984; 67 pp. (Stane Mozina. ICPE Training Series; No. 3).

This guide is intended for trainers, personnel managers, training officers and others associated with developing and implementing training programs and manpower activities. There are eight chapters which address the following: concepts of planning for manpower development; the planning process, manpower management; an information system for manpower planning; and methods and techniques of manpower planning and development. The guide includes a glossary of the terms and definitions used throughout the text.

HRM-Shelf.

MANUAL/ GNL/ HRM/ HRM-7/ HRM-2/ ENG/ Manpower planning/ Manpower projections/ Job description/ Staff development/ In-service training/ INT.

114. International Planned Parenthood Federation. Community Participation in Family Planning--Some Suggestions for Organization Development and Management Change. London: International Planned Parenthood Federation; 1987.

"The purpose of this paper is to review some of the issues surrounding the management of a family planning project which seeks to encourage the participation of the community for which it is being implemented. The paper is intended to complement the first paper in this occasional series ("The Community Participation Approach in Family Planning Programmes"), in which guidelines were suggested for developing a participatory project. Here some suggestions will be offered as to how the staff of a Family Planning Association could best manage a community participation project."

HRM-Organizational Development.

READ/ FP/ POL/ HRM/ ENG/ Community participation/ Organizational Development/ Management of change/ INT.

115. Isgar, Tom (Case Western University). Broken Squares: Nonverbal Problem-Solving; 1973; 10 pp.

This is a group exercise on problem solving. Requiring approximately forty-five minutes, each group of six people must silently, and cooperatively, solve a puzzle. The exercise is designed to analyze some aspects of cooperation in solving a group problem and to sensitize participants to behaviors which may contribute toward or obstruct solving the problem. This could be used by trainers as an introduction to a discussion on problem solving and interpersonal communications.

HRM-Problem Solving.

EXER/ GNL/ HRM/ HRM-1/ ENG/ PROBLEM SOLVING/ ORGANIZATIONAL BEHAVIOR/ INTERPERSONAL COMMUNICATIONS/ INT.

116. Jacobson, Mark L., Miriam H. Labbok, Anne N. Murage, Robert L. Parker. Individual and Group Supervision of Community Health Workers in Kenya: A Comparison. Washington, D.C.: National Council for International Health Annual Conference (presented at); 1985; 20 pp.

Report on a study conducted in Kenya that compares the effectiveness of supervising community health workers as individuals or in groups. The study design is discussed and the findings are presented and supported by tables that compare the data collected. This reading would be useful when discussing the design of supervision systems for community based health programs.

HRM-Supervision.

READ/ FP/ HRM/ HRM-9/ ENG/ CBD programs/ Organizational design/ Supervision/ Village health workers/ INT/ KEN/.

117. Jacome, Edgar S. The Supervision of Lidia. Boston, MA: FPMT; 1987; 6 pp.

In this case, a promoter working for a CBD program in a Latin American country struggles with the barriers that affect her ability to perform her job effectively. A consultant, assigned to "identify the unique features of successful CBD programs" for his own organization, observes the promoter as part of his research. The issues raised include: supervision and support of CBD personnel; communications; flexibility of protocols and policies; user demand and perspective; and, incentives and disincentives. The case can be dissected taking the perspective of the program director, the consultant, or the promoter, and could even be adapted to be a role play exercise to illustrate the complex issues faced at the different levels of service delivery.

PLN-CBD Programs.

CASE/ FP/ HRM/ HRM-9/ PLN/ PLN-6/ ENG/ CBD Programs/ Operations Planning/ Supervision/ Program Planning/ Service Delivery Systems/ Interpersonnal Communications/ Incentives and Disincentives/ LAA/ INT/.

118. Jacome, S. Edgar. Martha Torres. Boston, MA: FPMT; 1987; 4 pp.

This case presents numerous issues of human resource management that arise in a community based distribution program in Latin America. During her tenure, a motivator in the program works under two different supervisors. Issues are raised about community involvement in CBD programs. The case could be used as the basis for a classroom discussion or to perform a written analysis.

HRM-Supervision.

CASE/ FP/ PLN/HRM/ PLN-6/ HRM-9/ ENG/ Program Planning/ Supervision/ CBD Programs/ Personnel Recruitment/ LAA/ INT/.

119. Jain, Sagar C., K. Kanagaratnam, John E. Paul. Management Development in Population Programs. Chapel Hill: Department of Health Administration, School of Public Health, the University of North Carolina at Chapel Hill; 1981; 407 pp.

This publication is the result of a two-year project to identify the major managerial issues national population programs face. Divided into three parts, the book begins with detailed country case studies of the current and planned management development activities of seven countries with well-established population programs. Those countries are: Bangladesh; Egypt; Indonesia; Kenya; Korea; Malaysia; and Thailand. This section provides substantial in-depth information on the population programs in the countries mentioned above. Section two is a series of position papers on management development in national population programs. The final section is a report on a 3-day workshop organized to: review and refine the issues identified in the country case studies and the position papers; assign priority to the observed management issues; and to suggest appropriate roles for national programs, education and research institution, and donor agencies in addressing these issues. This is a comprehensive volume containing information on a number of topics.

HRM-Shelf.

READ/ FP/ HRM/ POL/ HRM-6/ ENG/ POL/ INT/ BAN/ EGY/ IND/ KEN/ KOS/ MAY/ THA/.

120. Job Evaluation Work Kit; 7 pp.

This "kit" has been developed to serve as a guide in preparing job descriptions. It includes: a statement on the value of job descriptions; guidelines for preparing job descriptions; and a glossary of terms related to job descriptions. While this was prepared to be used in a hospital setting, the information it contains is readily transferrable to other areas.

HRM- Job Description.

Tool/ HLTH/ HRM/ HRM-2/ Eng/ Job Description/ INT.

121. Kalaule, Ezekiel B.; Jane Kwawu (CAFS). Report on the Consultation to Plan the Course on: "Management of Family Planning Programmes": Centre for African Family Studies; March 24-April 7, 1986; 20 pp.

HRM-Shelf.

HRM/ ENG/ AFR/ INT/.

122. Kalaule, Ezekiel B., Jane Kwawu, Hammouda Bellamine (Centre for African Family Studies (CAFS)). Report on the First Anglophone Course in Management of Family Planning Programmes. 1 ed.: Centre for African Family Studies (CAFS); May 28, 1986; 91 pp.

These two volumes report on a course in Family Planning program management given at the Centre for African Studies. The course was designed to improve the efficiency and effectiveness of family planning program managers in planning, implementing and evaluating programs. The first volume is a detailed report on

the planning of the course. The second volume reports on the specifics of the course. The contents include: the course goals and objectives; course content; a time table; training and learning techniques, the organization of the course; a case study integral to the course; an evaluation; and an analysis and a summary of recommendations. The content of the course has units on the following; an analysis of the environment in which family planning programs are planned and operated in Africa; different approaches to service delivery; the management process; program planning; program implementation; personnel issues; management of equipment , supplies; aspects of financial management; program evaluation; field work; and project writing.

HRM-Shelf.

COURSE/ FP/ HRM/ HRM-1/ PLN/ LOG/ FIN/ FIN-1/ LOG-1/ POL-3/ ENG/
Policy environment/ Family planning programs/ Program cycle/
Program planning/ Fiscal techniques/ Management functions/
Logistics cycle/ INT/ AFR/.

123. Kalaule, Ezekiel B. Jane Kwawu and Hammouda Bellamine (CAFS). Report on the Second Anglophone course in Management of FP Programs; November 28, 1986; 44 pp. The report contains a list of the training objectives for the course. Included are units on: 1. analyzing the environment in which FP programs are planned and operated in Africa; 2. different approaches to FP service delivery; 3. the management process; 4. project writing; 5. FP program planning; 6. program implementation issues; and, 7. selected personnel issues. A timetable for the workshop and an evaluation sheet are also included. Trainers could use this outline to aid them in preparing a workshop or course on any of the topics.

PLN-Shelf.

COURSE/ TOOL/ FP/ POL/ HRM/ PLN/ PLN-5/ POL-3/ HRM-1/ HRM-3/ HRM-2/
Policy Environment/ Service Delivery Systems/ Program
Planning/ Family Planning Programs/ Implementation/ Management
Functions/ Personnel Procedures/ Needs Assessment/ INT/.

124. Kanter, Rosabeth M. Power Skills in Use: Corporate Entrepreneurs in Action. New York: Simon & Schuster; 1983; 68 pp. This reading is two detailed and comprehensive chapters on different aspects of achieving change within an organization. Focusing on corporate setting, in the first chapter the author details the skills, strategies, tools and tactics, successful entrepreneurs use to turn ideas into innovations. The second chapter discusses the use of participation, and the dilemmas it poses, in achieving productive changes. A trainer might skim this material for ideas to develop a session on the management of change.

HRM-Management of Change.

READ/ GNC/ HRM/ HRM-4/ ENG/ Management of Change/ Organizational
Development/ INT.

125. Kanter, Rosabeth Moss. Dilemmas of Managing Participation; 22 pp.

This article provides an in depth look at the use of participative management techniques. Included is a list delineating many appropriate applications of participative management. In addition, the author discusses the dilemmas faced in initiating and implementing this technique successfully, noting the common pitfalls and how they might be avoided.

HRM-Self Management.

READ/ GNL/ HRM/ HRM-3/ ENG/ Self Management/ Management of Groups/ Delegation/ Management Style/ INT/.

126. Katuala, Jacques, and David Gould (University of Pittsburgh). Le Management des Ressources Humaines. Pittsburgh: University of Pittsburgh; 1983; 178 pp. (Seminaire Francophone en Management du Developpement; Module II; (Module II)).

One of the four modules designed to improve the skills of managers on the development field. The emphasis is on programs in Africa and the Caribbean, but is applicable to development situations in other regions. This course is divided into six sessions that focus on different aspects of human resource management. They include: an analysis of the context in which HRM must take place in Africa and the Caribbean; the importance of managing human resources; developing a logical and systematic approach to human resource management; specific information on personnel management, including leadership and management style; techniques for recruitment selection and evaluation of personnel; specific issues surrounding human resource management in Africa and the Caribbean, such as women managers; and a section on how this module is linked to the other modules. The course includes exercises and questionnaires for most of the sessions.

HRM- Shelf.

Course/ Exer/ GNL/ HRM/ HRM-3/ HRM-1/ HRM-4/ HRM-9/ FRE/ Women/ Management, General/ Personnel Recruitment/ Personnel Selection/ Performance Appraisal/ Management of Change/ Conflict Resolution/ Time Management/ Management Style/ Management in Other Cultures/ INT/ AFR/ CRB/ FAF/.

127. (John F. Kennedy School of Government, Harvard University). Kennedy School - Course Outline - Leadership; 6 pp.

This is an outline of ideas on the topic of leadership, taken from a course conducted at the Kennedy School of Government at Harvard. The thoughts are presented in an abbreviated form, providing the reader with a sketch of the issues addressed in the course.

HRM-Management Style.

TOOL/ GNL/ HRM/ HRM-1/ ENG/ Management Style/ INT.

128. Ketelhohn. FODA-Diagnostico Organizacional. San Jose, Costa Rica: INCAE; 26 pp.

Transparencies or flipcharts on a specified method of strategic planning. This method, FODA, stands for strengths, opportunities, weaknesses, and constraints (fortaleza, oportunidad, debilidad, amenazas). Questions and "fill-in" charts are included to walk students through a strategic planning process.

PLN-Strategic Planning.

EXER/ CHART/ GNL/ HRM/ PLN/ HRM-10/ PLN-1/ PLN-2/ SPA/ Strategic planning/ Situational analysis/ Organizational diagnosis/ Problem solving/ Problem identification/ INT/.

129. Kirkpatrick, Donald L. How to Manage Change Effectively. San Francisco, CA: Jossey-Bass Publishers; c1986; 280 pp. (The Jossey-Bass Management Series); ISBN 0-87589-659-6.

HRM-Shelf.

HRM/ ENG/.

130. Korten, Frances F. and David C. Casebook for Family Planning Management-Motivating Effective Clinic Performance. Boston, Massachusetts: The Pathfinder Fund; 1977; 338 pp.

Note: The Spanish edition of this book is currently out of print. This comprehensive casebook was developed to improve the effectiveness of management of family planning programs. "It is divided into three parts, each including a combination of conceptual materials, case problems, and case analyses. Part I focuses on the question, "what difference can management make?"...Part II looks in more detail at how management can stimulate more effective work from the operating personnel" and presents management tools to use in order to achieve this. Part III discusses the interrelationship of management tools and development strategy. Twelve cases are included in the text addressing a variety of issues affecting clinic performance including: supervision; data collection; training; and performance feedback. This book can be used for individual self-study, self-directed group study, or informal classroom use.

HRM-Shelf.

CASE/ READ/ FP/ PLN/ HRM/ HRM-1/ HRM-2/ HRM-3/ HRM-9/ HRM-10/ PLN-3/ PLN-5/ PLN-6/ ENG/ SPA/ Supervision/ Management Functions/ Target Setting/ Goal Setting/ Management Style/ Organizational Design/ Organizational Development/ Workplans/ Clinic Efficiency/ Patient Flow Analysis/ BB/ RTI FRE/ INT/.

131. Korten, Francis F., David C. Korten and Dierdre Strachan. The Valdivian Family Planning Program. Casebook For Family Planning Management. Korten, Francis F. and David C. Korten. USA: The Pathfinder Fund; 1975; O1977: p281 - p332; 50 pp.

Note: This case is the twelfth and final case located in the Casebook For Family Planning Management.

This case synthesizes the discussion of the four major management tools addressed throughout the book - targets and performance feedback, supervision, training, and organization. In this case, "the Head of the National Family Planning Program in a Latin American country is holding a meeting with his central office staff. It is one of a series of meetings to review the program operations and determine changes needed to improve program performance. In the meeting, the central office staff are discussing the performance of the clinic and promotional personnel. Their discussion, together with the background information in the case, provide [ample] data on both the program's current motivational climate and the managerial factors creating it." The reader is asked to "diagnose the current problems and to make recommendations for program improvement. Trainers could use this case to conclude a comprehensive training program on organizational design and human resource management. As a final course project, participants could participate in a group discussion or prepare a written analysis and list of recommendations.

HRM-Shelf.

CASE/ FP/ HRM/ HRM-3/ HRM-9/ HRM-10/ ENG/ SPA/ Organizational Development/Supervision/ Reorganization/ Performance Appraisal/ In-service Delivery/ Target Setting/ LAC/ INT/.

132. Lafferty, J. Clayton (Human Synergistics). The Desert Survival Situation Manual; 35 pp.

A group decision making experience for examining and increasing individual and team effectiveness. The simulation described is based on over 2,000 actual cases in which men and women lived or died depending upon the survival decisions they made. "Life" or "death" of group members depends on how well the team can share its present knowledge of a relatively unfamiliar problem so that the team can make decisions that will lead to survival.

HRM- Problem Solving.

EXERCISE/ GNL/ HRM/ HRM-9/ ENG/ Organizational Behavior/ Problem Solving/Conflict Resolution/ Decision Making/ Team Building/ INT/.

133. Lagman, Professor Oscar P. Jr. Office Of Health Education And Personnel Training. Manila, Philippines: Asian Institute of Management; 33 pp.

Note: This case is contained in the AIM Casebook.

In an effort to improve the effectiveness of the motivators in the Philippine population program, the Project Director for Personnel training is reviewing the objectives and the content of the training. The existing program is described briefly, including a summary of qualifications that must be met by the motivators in order to fill the role. Attached to the case are sample course syllabi that have been used for previous programs. Trainers could use this case to have participants plan a new course for motivators, or to perform an analysis on the training program.

PLN-Shelf.

CASE/ FP/ TOT/ PLN/ HRM/ TOT-2/ PLN-4/ ENG/ Staff Development/ In-Service Training/ Curriculum Development/ Course Design/ PPI/ INT.

134. Lawler, Edward. and: Ray Olsen. Pay and Organizational Effectiveness: Pay In New Plants; 1977; 16 pp.

Although the primary focus of this article is how to set up a remuneration system in a new corporate plant, it does contain transferable information. Among the topics discussed in the article are: management style; self-management; analysis of the potential work force; pay and benefits; and career development. The article discusses how decisions made about the topics listed above can affect organizational development, and how remuneration systems fit into the matrix of human resource management.

HRM- Remuneration Systems.

Read/ GNL/ HRM/ HRM-8/ Eng/ Remuneration Systems/ Management Style/ Self Management/ Career Development/ INT.

135. Lawrence, Paul R. Comment Faire Face a la Resistance au Changement. Harvard Business Review; January-February 1969; 47(1).

Translated from "How to deal with Resistance to Change".

Two major themes are discussed which are still valid: 1) resistance to change does not stem from technical factors but from social and psychological considerations and participation by line managers and workers in the change process, motivated by "staff" managers helps to improve communication and avoid conflicts. Resistance to change is neither good nor bad; it could be founded on the right or wrong reasons, but it is always a signal that management needs to study the problem carefully.

HRM management of change.

READ/ GENERAL/ HRM/ FRE/ DOM/.

136. (Yale School of Organization and Management). Leadership and Decision-Making in Organizations - Selected Cases. New Haven, CT: Yale University; 1984; 8 pp.

This is a series of short exercises designed to examine leadership styles. In the first section, five different processes for making management decisions are defined. Following are five scenarios and the reader is asked to determine which decision making process to employ in this situation. Participants then form groups and must reach a group consensus as to which decision making process they will utilize. Presently, the scenarios do not reflect a health care environment, but trainers could readily adapt them to reflect a situation relevant to participants.

HRM-Decision Making.

EXER/ GNL/ HRM/ HRM-1/ ENG/ Decision-making/ Management Style/ Management of Groups/ INT.

137. Levinson, Harry. La Administracion por Objetivos - ¿De Quien? (Management by Objectives - Whose?): Harvard Library of Business Management, Harvard College. Dist restricted.; 1972; 21 pp.

The author attempts to point out some of the problems faced by organizations attempting to implement management by objectives and how to overcome them.

HRM - management by objectives.

TOOL/ GEN/ HRM/ SPA/ INT/.

138. Lindenberg, Marc, Benjamin Crosby. Managing Development: The Political Dimension. West Hartford, CT: Kumarian Press; 1985; 217 pp.

"The purpose of this book is to help development managers improve their capacity to understand and perform managerial roles, in particular those which require skills in political analysis and strategy design." Using a combination of conceptual text, case studies and case analysis, the book is designed "to help managers become more successful negotiators, representatives, coordinators, advocates and strategists." Divided into three parts, the book proceeds from principle to practice. Part I, "The Role of the Manager and Political Analysis", details the work of development managers, and the political roles they play. The political analysis process is discussed, followed by the design and implementation of an appropriate and effective strategy. In Part II, "The Manager and the Domestic Political Environment", a set of case studies are presented for analysis. Study questions are provided, as is an analysis prepared by the authors. In Part III, "Managerial Strategy and International Pressure", the authors describe the additional concerns faced by managers when international "actors" become part of their political environment. Written as a text, trainers can use this book as the basis of a course, or they could use the cases and analysis as a course component.

POL-Shelf.

READ/ CASE/ HLTH/ POL/ POL-3/ HRM/ ENG/ Policy environment/ Political factors/ Government/ Organizational development/

Resistance to change/ Policy development/ INT/ BB.

139. Lippitt, Gordon. Organization Renewal Inventory. New York, NY: Appleton-Century-Crofts; 1969; 4 pp.

HRM-Shelf.

HRM/ TOOL/ ENG/.

140. Lippitt, Gordon. Organization Renewal - A Challenge to Pro-Active Managers. Bethesda, MD: Development Publications; 3 pp.

HRM-Shelf.

HRM/ ENG/.

141. Lippitt, Gordon L. and Warren H. Schmidt. Crises in a developing organization. Harvard Business Review; November-December 1967; 45(6): 102-112; CODEN HRM-Organizational Development.

Describes stages and crises in organizational development and focuses on the skills with which executives recognize these crises and deal with them. The crises also have important implications for executive development, including the kinds of skills and knowledge they need to use (hand-out for high level executives).

HRM-Organizational Development.

READ/ GNL/ HRM/ ENG/ organizational development/ DOM/.

142. Lippitt, Gordon L. and Warren H. Schmidt. Crises in a Developing Organization. Harvard Business Review; Nov-Dec 1967; 45(6).

Describes stages and crises in organizational development and focuses on the skill with which executives recognizes these crises and deal with them. The crises also have important implications for executive development, including the kinds of skills and knowledge they need to use (Handout for high level executives).

HRM org development.

READ/ GENERAL/ HRM/ ENG/ ORGANIZATIONAL DEVELOPMENT/ DOM.

143. Lippitt, Gordon L., Peter Langseth and Jack Mossop. Implementing Organizational Change. San Francisco: Jossey-Bass Publisher; 1986; 185 pp.

HRM-Shelf.

HRM/ ENG/.

144. Lo Que Debemos Observar en un Grupo (What We Must Observe in a Group); 7 pp.

An introduction to managing a group and dealing with problems inside the group. Gives detailed, numbered steps.

HRM - group dynamics.

TOOL/ GEN/ HRM/ SPA/ group dynamics/ INT/.

145. Lo Que Debemos Observar en un Grupo (What We Must Observe in a Group); 7 pp.

HRM - group dynamics.

TOOL/ GEN/ HRM/ group dynamics/ SFA/ INT/.

146. Lodge, George, and Richard Wlaton, Jnaice McCormick, Shoshan Zuboff (Harvard Business School). Sources and Patterns of Management Authority: Harvard Business School; 1983; 9 pp.

This article discusses the various sources of management authority within organizations and how the organizational structure determines the ways in which this authority is implemented. While written primarily to describe profit sector organizational structures, the article includes a section on participative and consensual management, raising issues that have relevance to family planning program management. This section of the paper could provide a training session on the human resource management component of organizational development.

HRM-Organizational Development.

READ/ GNL/ HRM/ Organizational Development/ Organizational Design/ Supervision/ INT/.

147. Mackenzie, R. Alec. The Management Process in 3-D. Harvard Business Review; November- December 1969; (No. 69610): pp. 80-87.

Note: 2 copies (1 French, 1 English).

This is a detailed diagram of the management process showing the different elements, functions and activities which comprise the process. An explanatory narrative accompanies the diagram. This could be used as a handout for participants in a training session introducing the role and functions of managers.

HRM- Management, General.

TOOL/ GNL/ HRM/ HRM-1/ ENG/ FRE/ Management, General/ Management Functions/ INT.

148. Mackey, Daniel Murnane. Employment at Will and Employer Liability. 1 ed. New York: AMA Membership Publications Division; 1986; 180 pp.

This is a detailed technical publication that surveys the volatile legal problems surrounding the discharge of an employee. Written for the lay reader, the eight sections of this text focuses on the leading precedents and recent decisions that illustrate the points involved. While pertaining directly to the legal system in the U.S. the following two sections may be of use to the manager outside the U.S.; contracts with employees including implied contracts; and the do's and don'ts of discharge.

HRM-Shelf.

READ/ GNL/HRM/ HRM-6/ HRM-9/ ENG/ Operating procedures/ DOM.

149. Maclay, Elise, Editor. BIZ; Jan -Feb 1987 and May-June 1986; 8&7(1&3).

This journal contains articles written in very simple language that cover a variety of subjects. Included are pieces on: delegation; working for more than one boss; how to write more strategically; how to speak with authority; how to handle questions from the audience; managing your own boss; and negotiating. The articles could easily be adapted for lower and middle level managers.

Shelf- Journal:BIZ.

READ/ GNL/ HRM/ POL/ HRM-9/ POL-3/ ENG/ Delegation/ Conflict resolution/ Management style/ Interpersonal communications/ Negotiation/ DOM/.

150. Mager and Pipe. Analyzing Performance Problems: Chapters 4, 5, and 6; 64 pp.

These three chapters are written to instruct the reader on how to write performance objectives, the conditions that should be included in the objectives, and the criteria for acceptable performance. The format of this text includes mini-exercises that the reader must complete in order to advance in the text. This can be used as the basis for a discussion on developing performance objectives for personnel and utilizing them as a component of evaluation.

HRM- Performance Appraisal.

Exer/ Read/ GNL/ HRM/ HRM-3/ ENG/ Supervision/ Performance Appraisal/ Job Description/ INT.

151. Management Sciences for Health. Annex to the Final Report of a Course on Health Manpower Planning and Management for the Ministry of Health, Yemen Arab Republic. Boston, MA: MSH; 1987.

HRM-Shelf.

HRM/ ENG/.

152. Management Sciences for Health (FPMT); Leonhardt, Thomas C. Supervision Workshop: Family Health and Population Project, Senegal. Boston, MA: Management Sciences for Health; 1987; 48 pp. This is a ten day course designed to improve the supervisory skills of personnel working in the Family Health and Population Project in Senegal. In addition to a training component on the concepts and technical skills for effective supervision, the workshop also engaged participants in designing supervisory tools for field use. The entire package consists of: a report on the course; course objectives; a course outline; background readings; and a series of supervisory forms for field use.

HRM-Supervision.

TOOL/ READ/ COURSE/ FP/ HRM/ HRM-9/ FRE/ SEN/ Supervision/ Performance Appraisal/ Management style/ In-service training/ INT.

153. Management Sciences for Health. Team Building/ Team Work/ The Role of the Manager. Boston, MA: MSH; 52 pp. Three separate training sessions are included in the folio. They address the skills needed for the role of the manager. The sessions on team building and team work each include objectives, an activity plan and a series of exercises. The session on management contains several articles that discuss: critical managerial skills, characteristics of managerial work; and the manager's work roles.

HRM-Shelf.

COURSE/ HLTH/ HRM/ HRM-1/ HRM-4/ ENG/ Team Building/ Management Functions/INT/.

154. Management Sciences for Health. Trainer's Guide - Manpower Course Introduction. Boston, Massachusetts: Management Sciences for Health; July 1984; 32 pp.

This is a training guide to an introductory session of a 5 day course on Manpower. It is a 1-2 hour session and comes with trainer notes, a role play exercise, articles, and relevant flip charts.

HRM-Planning (manpower).

COURSE/ HLTH/ HRM/ HRM-7/ ENG/ Manpower planning/ INT.

155. Managing a Management Development Institution. Geneva, Switzerland: International Labour Office; 1982; 277 pp. (Milan Kubr. Management Development Series; No. 18).

This book was written for anyone involved in designing, planning, managing, and supervising management development institutions. Part I includes chapters on: strategic planning and management links with the environment; recruiting and developing personnel; organizational development and program planning and control. Part II contains four case studies of management institutes in Geneva, Ireland, India, and Venezuela.

Shelf-HRM.

READ/ CASE/ GNL/ HRM/ HRM-1/ HRM-9/ HRM-10/ ENG/ Staff Development/ Organizational Development/ Supervision/ Personnel Recruitment/ INT/ VEN/ IDI/ IRR/ SWI/ BB2/ RTI.

156. (Harvard Business School). Managing Interpersonal Conflict. Harvard University: Cambridge, MA; 1978; 15 pp.

This reading explores the nature and sources of interpersonal conflict. It is written to help the reader understand the determinants and dynamics of this conflict and includes a discussion of several specific approaches to managing conflict. Trainers could use this as a background reading for a session on conflict resolution.

HRM-Managing Conflict.

READ/ GNL/ HRM/ HRM-1/ Conflict Resolution/ Management Style/ INT.

157. Mayo-Smith, Ian. How Can We Keep Our Staff?: The Bokondo Ministry of Works Case. Managing People: Five International Cases; 1983.

This easily read case deals with questions of manpower requirements, supply, and development. In a fictitious country, the Head of Personnel for the Ministry of Works and Finance is having difficulty in recruiting and retaining professional staff due to a number of factors described in the case. The reader is asked to detail some possible solutions to the problem. NB: This case is also contained in a case book, "Managing People: Five International Cases".

HRM-Planning (Manpower).

CASE/ GNL/ HRM/ HRM-7/ ENG/ Manpower planning/ Manpower requirements/ Manpower supply/ Career development/ INT/ AFR.

158. Mayo-Smith, Ian. Managing People - Five International Case Studies. 2 ed. West Hartford, CT: Kumarian Press; 1983; pp 25. The cases contained in this book are based on actual events in five different countries. They deal with a wide variety of personnel management problems in the context of organizations in developing countries. NB: Each case was individually abstracted. To see the abstract you can do a search by the author's name.

HRM-Shelf.

CASE/ GNL/ HLTH/ HRM/ HRM-1/ HRM-8/ HRM-7/ HRM-9/ HRM-10/ ENG/ Supervision/ Management style/ Personnel procedures/ Remuneration systems/ Operating procedures/ Women/ Cross cultural management/ Manpower supply/ Manpower planning/ Manpower requirements/ Career development/ Managing conflict/ Staff development/ INT/ AFR/.

159. Mayo-Smith, Ian. Men's Work and Women's Worth: The British Toy Factory Case. Managing People: Five International Studies; 1983.

This case describes a small manufacturing company in the United Kingdom which employs more than 50% women who on average receive about 40% lower salaries than the male employees. The case looks at the issues raised by this disparity and the criteria used to establish the existing pay scale. New criteria are proposed and the reader is asked to assess them and determine what other alternatives might exist. The reader then must decide how this affects sex bias within the organization, and to use the criteria to evaluate a position within the organization. The case allows the reader to analyze the situation and to get some practice in applying criteria to determine remuneration. NB: This case is also contained in a case book, "Managing People: Five International Case Studies".

HRM-Remuneration systems.

CASE/ GNL/ HRM/ HRM-8/ ENG/ Remuneration systems/ Operating procedures/ Personnel procedures/ Women/ INT.

160. Mayo-Smith, Ian. Private Lives and Official Duties: The UNARD Case. Managing People: Five International Studies; 1983: pp. 4-7.

This clearly laid out case focuses on various personnel issues faced by a chief personnel officer on a site visit to a fictitious U.N. rural development project in the Caribbean. The reader is asked to identify the central issues in the case, which includes questions as to whether a project official's private life is interfering with his official assignment. The reader is then asked to draft some policy guidelines for Project Managers in the field to guide them in this kind of case. NB: This case is also contained in a case book; "Managing People - Five International Case Studies".

HRM-Supervision.

CASE/ GNL/ HRM/ HRM-9/ HRM-8/ ENG/ Supervision/ Management style/ Personnel procedures/ INT/ LAC.

161. Mayo-Smith, Ian. The Problems of a Supervisor: The District Health Center Case. Managing People: Five International Case Studies; 1983.

This clearly written case describes a district health center on a fictitious Caribbean island. Background is given on the center and the personnel employed there, followed by a description of events that highlight the need to develop the supervisory skills of the personnel. There are also issues raised by the fact that one of the supervisors is female and she is responsible for a male staff. NB: This case is also contained in a casebook, "Managing People: Five International Case Studies".

HRM-Supervision.

CASE/ HLTH/ HRM/ HRM-10/ HRM-1/ ENG/ Supervision/ Managing conflict/ Staff development/ Managing style/ INT/ LAC.

162. Mayo-Smith, Ian. Who's Practising Discrimination?: The Makuta Recruitment Case. Managing People: Five International Case Studies; 1983.

Drawn from a situation in a fictitious West African country, this case focuses on issues of organizational design, recruitment, and personnel policy. The country has implemented a law, designed to encourage citizens, who have travelled overseas to study, to return to the country and accept appointments in the civil service. The application of this law in an individual case raises issues about discrimination on ethnic grounds, and about the hierarchy of the design making process within the Ministry described here. NB: This case is also contained in a casebook, "Managing People: Five International Case Studies".

HRM-Policies.

CASE/ GNL/ HRM/ HRM-6/ HRM-7/ HRM-9/ Operating procedures/ Personnel procedures/ Cross cultural management/ Manpower supply/ INT.

163. McCann, Joseph E. and Thomas N. Gilmore. Diagnosing Organizational Decision Making through Responsibility Charting. Sloan Management Review, Reprint Series; Winter, 1983: Cambridge, MA.

This article describes a technique called "Responsibility Charting" which builds an organization's understanding of the group decision-making process. A description of the components and steps in this technique are presented, accompanied by a case study of a corporation that illustrates the decision making technique. This is essentially a detailed description of a model for group decision-making, and could serve as background reading for a training session on this topic.

HRM-Decision Making.

READ/ GNL/ HRM/ HRM-1/ ENG/ Decision-Making/ Management of Groups/ INT.

164. McCaskey, B. Marco de Referencia para el Analisis de Grupos de Trabajo (A Framework for the Analysis of Work Groups). Translation by Athos, Anthony and Barrett, Diana: INCAE; 1987; 27 pp.

Note: Article (c) 1979 by the President and Fellows of Harvard College.

The article observes "work groups" from an administrative point of view. A case study (Corporacion El Merito - The Merit Corporation, revised version of the original by Anthony Athos and Diana Barrett) is included and the article analyzes it as an example.

HRM - group dynamics.

CASE/ TOOL/ GEN/ HRM/ SPA/ INT/ group dynamics/.

165. McCaskey, Michael B. A Framework for Analyzing Workgroups. Cambridge, MA: Harvard Business School; 1979; 9-480-009; 27 pp. This case looks at groups from a managerial viewpoint. It focuses upon the features of group behavior important to the manager who wants to understand how to manage a group for increased effectiveness. The case asks the reader to analyze the workgroup by looking at each of the following: context; people; task requirements; formal organization; group culture; and outcomes. The case is presented sequentially, allowing the reader to assess these features over a period of time in order to determine which management techniques might affect the behavior of the group. This case is designed to serve as the basis for classroom discussion.

HRM- Management of Groups.

Case/ GNL/ HRM/ HRM-1/HRM-10/ ENG/ Management, General/ Management of Groups/ Conflict Resolution/ Management Style/ Team Building/ INT.

166. McCaskey, Michael B. Introduction to Organizational Design: The Regents of the University of California; 1974; 9 pp.

This reading introduces the concept of organizational design. Different models are presented, followed by a discussion of how they can be applied within the organizational framework and how to select the model that is most compatible with the objectives and tasks of a specific unit. The article also contains a table detailing the research findings on this topic.

HRM-Organizational Design.

READ/ GNL/ HRM/ HRM-10/ ENG/ Organizational Design/
Organizational development/ INT.

167. McCaskey, Michael B. Una Estructura para Analizar Grupos de Trabajo (A Framework for the Analysis of Work Groups): INCAE; 1987; 31 pp.

Note: translated by Rolando Hernandez under Francisco LeGuzman in 1987; original article by the President and Fellows of Harvard College in 1979.

The article observes "work groups" from an administrative point of view. A case study (Coperacion El Merito - The Merit Corporation, revised version of the original by Anthony Athos and Diana Barrett) is included and the article analyzes it as an example.

HRM - Work Groups.

TOOL/ CASE/ GEN/ HRM/ SPA/ work groups/ INT.

168. McCormack, Mark H. Tout ce que vous n'apprenez jamais a Harvard. 33 rue de Verneuil, 75007, Paris: Rivages/ Les Echos; 1985; 237 pp; ISBN 2-903059-65-9.

Note: This is a translation of the English book entitled: What They Don't Teach You At Harvard Business School. The English version is also available in the FPMT library.

This book is written to teach the reader new skills in working with people in any professional situation. Divided into three parts, Part I is on people and discusses how to assess people and use the resulting knowledge to your advantage. Applying the lessons from Part I, Part II focuses on sales and negotiations and Part III on conducting business. The author recommends a number of specific techniques which can be put directly into practice to produce tangible results.

HRM-Shelf.

READ/ GNL/ HRM/ HRM-1/ ENG/ FRE/ Interpersonal Communications/
Negociating/ INT/.

169. McCormack, Mark H. What They Don't Teach You At Harvard Business School. Toronto: Bantam Books; 1985; c1984; 256 pp.

Note: This book is available in English and French.

This book is written to teach the reader new skills in working with people in any professional situation. Divided into three parts, Part I is on people and discusses how to assess people and use the resulting knowledge to your advantage. Applying the lessons from Part I, Part II focuses on sales and negotiations and Part III, on conducting business. The author recommends a number of specific techniques which can be put directly into practice to produce tangible results.

HRM-Shelf.

READ/ GNL/ HRM/ HRM-1/ ENG/ Interpersonal Communications/
Negotiating/ INT.

170. McGregor, Douglas M. An Uneasy Look at Performance

Appraisal. Harvard Business Review; May-June 1957: pp. 89-94.

This article describes a process for managers and subordinates to evaluate job performance. The author outlines an approach that places the major responsibility for establishing performance goals and appraising progress toward them on the subordinate. The mechanics of this approach are not detailed, but the author discusses the potential impact of this approach which works on the premise that the subordinate is no longer being examined by his superior so that his weaknesses may be determined; rather, he is examining himself to define not only his weaknesses but also his strengths and potential. This article could be used as background reading for a discussion on evaluation techniques and/or incorporated into a role play that focused on this process.

HRM- Performance Appraisal.

Read/ GNL/ HRM/ HRM-3/ Eng/ Supervision/ Performance Appraisal/
Career Development/ Self Management/ Participative Management/
INT.

171. McLagan, Patricia; Peter Krembs. On-The-Level - Performance Communication That Works. St. Paul, MN: McLagan International, Inc.; 1988; 124 pp.

HRM-Shelf.

HRM/ ENG.

172. McMahon, Rosemary, Elizabeth Barton, Maurice Piot. On Being In Charge: A Guide for Middle-Level Management in Primary Health Care (Si Vous Etes Chargez De...). 2 ed. Switerland: World Health Organization; 1984; 366 pp.

This comprehensive guide book incorporates narrative and exercises designed to help middle level health care managers improve their skills. It is written in such a way that the reader can select a relevant section of the book and read it without reading the information that precedes or follows it. The book is arranged in four parts. Part I explains in simple terms the general principles of management as a system of thought, and the functions of mangement. Part II is concerned with personnel

relations: how to encourage and coordinate a health team, to communicate with groups of people and to supervise in a supportive way. Part III presents methods for the management of equipment and drugs and the functioning of a health center. Part IV deals with how to apply principles, methods, and management skills to the planning, implementation and evaluation of an area health service. Each part has several chapters and each chapter begins with a statement of learning objectives. Exercises related to specific chapters are located in the book. Trainers could use this book for background readings, exercises, or to aid them in designing course components.

HRM-Shelf.

READ/ MANUAL/ EXER/ HLTH/ PLN/ LOG/ MIS/ M&E/ HRM/ HRM-1/ HRM-9/ ENG/ FRE/ Management General/ Management Functions/ Management of Groups/ Interpersonal Communications/ Management Style/ Supervision/ Planning/ Implementation/ Inventory Management/ Procurement/ Evaluation/ Program Evaluation/ Needs Assessment/ MBOR/ Situational Analysis/ Mission Statement and Objective/ Data Sources and Collection Methods/ Program Monitoring Systems/ BB/ INT/.

173. Mechanic, David. Sources Of Power Of Lower Participants In Complex Organizations. Readings In Managerial Psychology. 3d ed.; 14 pp.

This reading explores the sources of power that lower level personnel have within an organization. The author discusses multiple variables affecting power relationships. Among those presented are those defined by the organizational structure, goals and ideology; those affecting control of access to persons related to power. Several examples are cited from health care settings, which may make this appropriate for background reading for trainers preparing a module on power sources.

HRM-Organizational Behavior.

READ/ HLTH/ HRM/ HRM-10/ ENG/ Organizational Behavior/ INT/.

174. The Medex Group (University of Hawaii). The Medex Primary Health Care Series. Honolulu, HI: The Medex Group; 35 Vol. The thirty five volumes in this series comprise a compendium of field-tested primary health care methods and materials. Using modules, manuals, and workbooks, "the Series stresses the training of middle level health personnel as trainers and supervisors as well as providers of health services. The series also places importance on community health workers and on strengthening the associated management systems needed to support the effective delivery of primary health care services at the local level."

Shelf.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

175. Medex Primary Health Care Series. Management Training Manuals and Workbooks. Honolulu, Hawaii: University of Hawaii, John A. Burns School of Medicine; 1983.

REF-SHELF.

READ/ MAN/ HLTH/ LOG/ HRM/ PLN/ POL/ IE&C/ MIS/ M&E/ TOT/ INT/.

176. Metzger, Norman. The Health Care Supervisor's Handbook. third ed. Rockville, Maryland: Aspen Publications; 1988; 250 pp. This is a comprehensive book on management and supervision in the health care setting. It is divided into three main sections: The New Organization: Supervisors and Managers as Motivators and Facilitators; Maintenance Functions: Supervisory "How-To's"; and A New Management Credo. Each section contains a number of chapters that are further divided into topics. They contain very specific and detailed information that should prove useful to managers and supervisors. For example in Section II, Chapter 10 is titled, "How to Handle Employee Complaints: An Opportunity Rather Than A Chore". The chapter is subdivided into topics, including, "Minimizing Grievances" and "Supervisor Attitudes". This book would be helpful to both trainers designing a human resource course that focused on management and supervision issues and to mid and senior level health care managers.

HRM-Shelf.

READ/ TOOL/ MAN/ HLTH/ HRM/ ENG/ Management style/ Management of groups/ Personnel procedures/ Staff development/ In-service training/ Supervision/ Performance appraisal/ Conflict resolution/ Negotiation/ Problem solving/ DOM/ INT.

177. Michaud Yves; Rene Piote. La direction du personnel. Montreal, Canada: Les Editions Agence d'ARC; 1978.

HRM-Shelf.

HRM/ FRE/.

178. Miles, Raymond E. Relations Humaines ou Ressources Humaines? Cambridge, Massachusetts: Harvard Business Review; July-August, 1965; 7 pp.

Note: This French version was translated from the English, Human relations or Human Resources.

This article discusses how managers have assimilated the notion of participative management and how this has led to two divergent definitions of participative management: one for subordinates and one for the managers themselves: the concept of human relations is applied to their subordinates, the concept of human resources is applied to how managers would like to be treated by their superiors. The article is based on a survey of more than 500 managers (1965) and elaborates on these concepts.

HRM-participative management.

READ/ GENERAL/ HRM/ FRENCH/ Management style/ Human resources management/ DOM.

179. Miles, Raymond E. Relations Humaines ou Ressources Humaines? Cambridge, Massachusetts: Harvard Business Review; July-August 1965; 7 pp.

This article describes how managers have assimilated the notion of participative management, and how this has led to two divergent definitions of participative management; one for subordinates and one for the managers themselves: the concept of human relations is applied to their subordinates, the concept of human resources is applied to how managers would like to be treated by their superiors. The article is based on a survey of more than 500 managers (1965) and elaborates on these two concepts.

HRM: participative management.

GENERAL/ HRM/ FRENCH/ management style/ human resources management/ DOM/.

180. (Harvard University). Mini-Case. Cambridge, MA: Harvard University; 1 pp.

This one page case description is written to challenge the problem solving skills of the reader. In this "mini-case," a dentist has been assigned to a Provincial general Hospital by the M.O.H. The dentist has a serious problem with the Program Director and the reader is asked to develop a strategy to solve this problem. The situation described reflects both the difficulties that can be posed by the structure of the health care system in developing countries, and those experienced by any employee with a poorly functioning manager.

HRM-Problem Solving.

CASE/ HLTH/ HRM/ HRM-1/ HRM-9/ ENG/ Problem Solving/ Resistance to Change/ INT.

181. Mintzberg, Henry. The Nature of Managerial Work. Englewood Cliffs, NJ: Prentice Hall Inc.; 1973; ISBN 0-13-610402-9.

Note: The Theory of Management Policy Series.

HRM-Shelf.

HRM/ ENG/.

182. Moore, Franklin G.,. Management in Organizations. New York: John Wiley & Sons; 1982; 592 pp; ISBN 0-471-87691-7.

HRM-Shelf.

HRM/ ENG/.

183. Moore, Leo B. Managerial Time. Industrial Management Review; 1968; Vol 9(No. 3): pp. 77.

This article discusses a study that was conducted to investigate managerial time. The ten most consistently reported interferences are described followed by the author's suggestions for solutions. This could be used as a background reading on time management.

HRM-Time Management.

READ/ GNL/ HRM/ HRM-2/ ENG/ Time management/ INT.

184. Morrisey, George L. Management by Objectives and Results for Business and Industry. 2 ed. Reading, MA: Addison-Wesley Publishing Compant; 1984; 252 pp.

This is a detailed how-to book using examples from the work environment to illustrate all facets of management by objectives and results. It is written both to serve as a text for a training program and can also be used as a manual for individual use on the subject. In the preface, the author helps the reader to determine which portions of the book can serve his/her individual needs. Content areas addressed in the text include: Mission statement and objectives; setting, writing, and evaluating objectives; preparing action plans; establishing controls; communications; and implementation. There is a workbook and an audio cassette available separately which can be used to supplement the text.

PLN-Shelf.

READ/ GNL/ PLN/ HRM/ PLN-2/ ENG/ MBOR/ Workplans/ Interpersonal communications/ Objective setting/ Implementation/ Management functions/ Strategic planning/ Program planning/ Mission statement and objectives/ INT.

185. Moumouni, BSF Adjou, Dr., Helene Agbessi Dos-Santos, Michel Damon, Dr. Training Unit on Health, Nutrition, and Family Economics. Cameroun: Panafrican Institute for Development; 1986; 17 pp.

This course is designed to prepare the supervisors of community health workers in Cameroun to provide in-service training. It is divided into three modules: 1) Situational analysis of the community; 2) The planning of a training program on health, nutrition, and family economics; and 3) Implementation of the training program. The course includes: objectives; methods; techniques; strategies; and programming.

HRM-Supervision.

COURSE/ HLTH/ HRM/ HRM-9/ FRE/ CAM/ In-service training/ Non-physician training/ Supervision/ CBD programs/ INT.

186. Musashi, Miyamoto. The Book of Five Rings: The Real Art of Japanese Management. NY, NY: Bantam Books; c1982; 107 pp.

HRM-Shelf.

HRM/ ENG/ JAP/ INT/.

187. Myers, M. Scott. Personal Analysis of Leadership Styles: Part One: Assumptions About People. Adapted from: M. Scott Myers. Every Employee a Manager. New York, NY: McGraw-Hill Book Company; 1970: Page 241-242; 2 pp.

Requiring me to two hours, this exercise is designed to illustrate the different styles of leadership and to give participants an opportunity to identify their own style. In addition, there is a narrative that describes the different leadership styles as defined by the developers of this exercise, and a discussion of how to determine which style is appropriate in a situation. This exercise can serve as an effective introduction to a discussion on management or leadership style.

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HRM- Management Style.

Exer/ GNL/ HRM/ HRM-1/ ENG/ Management Style/ Management,
General/ INT.

188. National Council for International Health. Management Issues
in Health Programs in the Developing World. Washington, D.C.:
NCIH; May 1986; 387 pp.

HRM-Shelf.

HRM/ PLN/ POL/ MIS/ ENG/.

189. Naturaleza y Diseño de Sistemas de Control (The Nature and
Design of Control Systems); 9 pp.

Implementation of planning, with the emphasis on control of human
resources.

HRM, PLN - planning implementation.

TOOL/ GEN/ PLN/ HRM/ SPA/ INT/ planning implementation/ human
resources/.

190. Naylor, J. C. Theory of Behavior In Organizations. A
Viewpoint Concerning Organizational Behavior / The Theory:
Chapter 1 and 2; 65 pp.

These two chapters are taken from a text on the theory of
behavior in organizations. The first chapter defines the
essential elements of behavior, including a theory on individual
behavior within organizations. The second chapter describes
three stages of theory. This is a technical and very detailed
presentation.

HRM-Organizational Behavior.

READ/ GNL/ HRM/ HRM-10/ ENG/ Orghizational Behavior/ INT/.

191. Nigeria. State Family Planning Co-ordinator Job Description;
3 pp.

Job description for the State Family Planning Co-ordinator.

HRM-Job description.

TOOL/ FP/ HRM/ HRM-2/ ENG/ Job description/ INT/ NIR.

192. La Organizacion para Lograr los Objetivos del Programa
(Organization to Achieve the Objectives of the Program); 6 pp.

Division of labor in order to best achieve goals, including
relationships between the organization and the supervisors.

HRM - division of labor.

TOOL/ GEN/ POL/ HRM - division of labor/ SPA/ INT/.

193. Ouchi, William G. Theory Z: How American Business Can Meet
the Japanese Challenge. NY, NY: Avon Books; c1981; 244 pp; ISBN
0-380-59451-X.

HRM-Shelf.

HRM/ ENGH/ JAP/ INT/.

194. Overseas Education Fund. Organizational Techniques. Washington, D.C.: Overseas Education Fund of the League of Women Voters; 58 pp.

This comprehensive, clearly written manual, details the processes involved in setting up an organization and in helping to ensure success. Using simple language and terminology, the 10 chapters cover the following: 1) Goals, Objectives, and Benefits of Organizing; 2) Structure of Organizations and Board; 3) Membership and Development of Members; 4) The Board; 5) Planning; 6) Budget; 7) Reports; 8) Communication; 9) Money and Other Resources; 10) Building Up an Organization and Analyzing Problems. This manual was written for use in Indonesia but it is readily adaptable for trainers in developing country situations world wide. Examples and illustrations supplement the text and can be used to make overhead transparencies. The manual also contains three useful appendices: a) a section on obstacles to good communication; b) a glossary of terms; and c) an example that illustrates the planning of a community literacy project. PLN-Shelf.

MAN/ GNL/ PLN/ FIN/ HRM/ Organizational design/ Goal setting/ Situational analysis/ Needs assessment/ Budgeting/ INT.

195. Pan American Health Organization (Pan American Sanitary Bureau - Regional Office of the World Health Organization). Managerial Analysis of Health Systems. Washington, D.C.: PAHO; 1983; 61 pp.

Note: Scientific Publication No. 449.

HRM-Shelf.

HRM/ ENG/.

196. Pascale, Richard Tanner, Anthony G. Athos. The Art of Japanese Management: Applications for American Executives. NY, NY: Warner Books; c1981; 363 pp; ISBN 0-446-30292-9.

HRM-Shelf.

HRM/ ENG/ JAP/ INT/.

197. Paxman, John and Jean Georges Dehasse. Le cas des centres de PMI desertes; 2 pp.

This short case was adapted from the English by Jean Georges Dehasse and focuses on the skills involved with problem solving. A nurse/midwife who oversees four PMI centres in the fictitious country of Dohran. She is confronted with very low utilization rates for the centers despite a high birth rate. She must analyze the problem and propose solutions. The case is accompanied by questions. NB: The English version (The Empty Maternity) is also accompanied by a very detailed analysis. There is a supplement (in English) to this case based on real-life experience of a Nigerian participant confronted with this problem. The case has also been used in conjunction with role play (acting out the case).

HRM- Problem Solving.

CASE/ FP/ HRM/ HRM-1/ HRM-9/ FRE/ Problem Solving/ Supervision/ Haiti/ INT/.

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198. Paxman, John M. (FPMT/Pathfinder Fund). The Empty Maternity. Boston, MA: Management Sciences for Health; 1987; 6 pp. This short case focuses on the skills involved with problem solving. A nurse-midwife who oversees four maternity centers in an African district, is confronted with very low utilization rates for the centers, despite a high birth rate in the district. She must analyze the problem and propose solutions. The case is accompanied by questions and a very detailed analysis which includes supplemental information. Trainers could use the information contained in the analysis as the framework for a group discussion on problem solving.

HRM-Problem Solving.

CASE/ FP/ HRM/ HRM-1/ HRM-9/ ENG/ Problem Solving/ Supervision/ AFR/ INT/.

199. Pearson, Peg, Jake Baker. Seattle Workers' Brigade: History of a Collective; 10 pp.

This article chronicles the evolution of an experimental business collective, owned and managed by those who worked in it. The authors describe how the collective was formed and the ensuing crises that resulted in its eventual dissolution. Reflecting the political sentiments held by some U.S. "counter-culture" groups in the 1960's and 1970's, this article describes the optimistic goals for participative management held by the collective, and some of the obstacles that prevented the group from achieving them.

HRM-Self management.

READ/ GNL/ HRM/ HRM-3/ ENG/ Self management/ INT.

200. Pfeiffer, J. William. The 1988 Annual - Developing Human Resources. San Diego, California: University Associates, Inc.; 1988; 127 pp.

This is the sixteenth volume in a continuing series of practical and useful materials collected for professionals in human resource development. The annual is divided into three sections: Structured Experiences, Instrumentation, and Professional Development. The materials included in the first two sections can be used or adapted for training purposes. The last section contains a series of articles of interest to the HRD professional.

HRM-Shelf.

READ/ GNL/ TOT/ HRM/ ENG/ INT/ BB2.

201. Phillips, James F., and Ruth Simmons, George B. Simmons, Md. Yunus. Transferring Health and Family Planning Service Innovations to the Public Sector: An Experiment in Organization Development in Bangladesh. *Studies in Family Planning*; March/April 1984; 15(2): p62-p73.

This paper reviews an experiment in organizational development of a family planning service delivery system in Bangladesh. Extensive background is provided on the project, followed by an outline of both the organizational and service delivery characteristics of the project, to identify factors that made this small scale experiment successful. Emphasis is given to the relevance of organizational factors. This continues in the second part of the paper, which describes the experimental intervention used in the project and the research strategy employed. The paper concludes with a framework summarizing the basic conceptualization of the project. The authors identify characteristics of: 1) public sector program organization management; 2) the client population; and 3) the contraceptive and maternal and child health services offered by the program as major classes of factors that determine contraceptive use and fertility change. This article could serve as a comprehensive background reading for a training session on organizational development.

HRM-Organizational Development.

READ/ FP/ HRM/ HRM-10/ Organizational Development/ Supervision/ Family Planning Programs/ CBD Programs/ Organizational Design/ INT/.

202. Phillips, Steven R., William H. Bergquist. *Solutions - A Guide to Better Problem Solving*. San Diego, CA: University Associates, Inc.; 1987; 127 pp.

This is a participative workbook combining narrative and exercises designed to improve the reader's problem solving skills. A series of problems are described and the reader is involved in the process of finding solutions. Different approaches to problem solving are presented and the reader is given an opportunity to apply and practice problem solving skills and techniques. Managers wanting to improve their own problem solving skills can use this workbook for themselves, or trainers might use it to develop exercises.

HRM-Shelf.

READ/ EXER/ GNL/ HRM/ ENG/ Problem solving/ INT/ BB2.

203. The Population Council. *Studies in Family Planning*; 1979-. The FPMT library contains issues of the bimonthly journal *Studies in Family Planning*, dating from 1979. An annual index lists articles published each year by author, subject and geographic area. The subject and geographic indexes list articles alphabetically by title. *Studies in Family Planning* is an international journal that addresses family planning and related health and development issues, with emphasis on activities in developing countries.

REF-Shelf.

READ/ FP/ POL/ PLN/ HRM/ LOG/ TOT/ MIS M&E/ FIN/ IE&C/ INT/.

204. Rahman El Tom, Abdel, M.D., Don Lauro, Ph.D., Suzan Wesley, B.Sc., Naila Mubarak, M.D. (Department of Community Medicine, Faculty of Medicine, University of Khartoum. Center for Population and Family Health, Faculty of Medicine, Columbia University. Community-Based Family Health Project.). Innovative Approaches to Supervision: Lessons from the Sudan Community Based Family Health Project; 20 pp.

Reports on several different approaches to supervision that were tried within a community based family health project in Sudan. Background information is provided on the Sudanese community health system, including an examination of the supervisory system and its shortcomings. In a pilot project, alternative and complementary approaches were implemented to support community health activities. A detailed description of the systems that were adopted is provided and both the problems and the benefits that resulted from these systems are discussed. Because this paper discusses several different approaches to supervising community based health systems, it can be useful background for a discussion or training module on supervision.

HRM-Supervision.

READ/ FP/ HRM/ HRM-9/ ENG/ SUD/ CBD programs/ Supervision/
Physician's assistant/ Organizational design/ INT.

205. Rakich, Jonathan S., Beaufort B. Longest, Jr., and Thomas R. O'Donovan. Managing Health Care in Organizations. Philadelphia: W. B. Saunders Company; c1977; 350 pp. (Saunders series in Health Care Organization and Administration); ISBN 0-7216-7451-8.

HRM- Shelf.

HRM/ ENG/.

206. Reinke, William A. Issues in the Supervision of CBD Projects. Baltimore, MD: The Johns Hopkins University, School of Hygiene and Public Health; 1983; 137 pp.

This paper is a compilation of literature, discussions and interviews on the supervision of family planning community based distribution projects. It is a comprehensive approach to the subject and is comprised of sections covering the following: 1) the selection and training of supervisors, including proposed content, format and methods for training; 2) the directing and controlling functions of supervision; 3) the support functions of supervision; 4) organizational support arrangements and management; and 5) principal recommendations for action research. Examples from numerous programs throughout the world are cited in the text. Sample forms, tables, and questionnaires accompany each section. Could be used as background reading, and as a manual for participants to refer to in their work setting. It could also be useful to trainers in preparing a course on supervision of CBD personnel.

HRM-Supervision.

TOOLS/ MANUAL/ READ/ FP/ HRM/ PLN/ PLN-6/ HRM-9/ ENG/ CBD
programs/ management functions/ Personnel recruitment/ Personnel

selection/ Supervision/ Training/ Remuneration system/
Organizational development/ Village health worker/ INT.

207. Richardson, Peter R. (Queen's University). Courting Greater Employee Involvement through Participative Management. Sloan Management Review: Massachusetts Institute of Technology; 1985: Volume 26, Number 2.

This article reviews the efforts of four large industries who have adopted participative work place programs. Their mutual objectives are noted as: increasing productivity; reducing costs; and achieving social benefits in the workplace. A chronicle and an analysis of the attempts made by each of these industries is provided. The author identifies the factors most critical to affecting the success of a program as: 1) top managements commitment to the activity; and 2) the way the activity is introduced. Although this article is written about corporate efforts to use participative management, it may contain ideas that are applicable for health care delivery systems.

HRM-Self/Participative management.

READ/ GNL/ HRM/ HRM-3/ ENG/ Self management/ Organizational design/ INT.

208. Rigny, Andre Jean. Diagnostic Organisationnel: Cas Vecus. Montreal, Canada: Les Editions Agence d'ARC; 1982; ISBN 2-89022-039-7.

HRM-Shelf.

HRM/ FRE/.

209. Roy, Somnath; M. Kataria, D.H. Nath, P.P. Talwar and others (National Institute of Health and Family Welfare). Modules on Health Management of Health assistant (Male & Female). New Delhi: National Institute of Health and Family Welfare; 207 pp.

Note: Photo copy.

HRM-Shelf.

HRM/ ENG/.

210. Rumley, J. Managing the Change Process. Washington, DC: Centre for Development and Population Activities; 1986; 6 pp. This is an exercise designed to improve skills in managing the change process. Divided into three parts, the exercise requires the reader to describe the present situation, analyze it and develop an action plan to change the situation. This is an individual exercise that could be augmented by a group discussion.

HRM-Management of Change.

EXER/ GNL/ HRM/ HRM-4/ ENG/ Management of Change/ Problem Solving/ INT.

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211. Schein, Edgar H. Consultoria de Procesos (Process Consulting). (Consultoria de Procesos: Su Papel en el Desarrollo Organizational).

The article defines process consulting and discusses how it differs from other types of consulting.

HRM - consulting.

TOOL/ GEN/ HRM/ SPA/ INT/ HRM - consulting/.

212. Schein, Edgar H. (Massachusetts Institute of Technology). Does Japanese Management Style Have a Message for American Managers? Sloan Management Review; Fall 1981; Volume 23(Number 1): pp. 55-68.

In this article, the author begins by addressing the fundamental issue of what American managers can really learn from the Japanese through an analysis of two recent books on Japanese management. The final four pages of the article might be useful to trainers, as they discuss culture in much more detail, looking at the different elements that define any culture. There are described as: the artifacts and creation of a culture; the values and ideology; and the basic assumptions and premises underlying the culture. In conclusion, this information is related to U.S. culture and the implications of all these factors on management in other cultures.

HRM-Management of Other Cultures.

READ/ GNL/ HRM/ HRM-1/ ENG/ Cross cultural management/ INT/ JAN.

213. Schein, Edgar H. Improving Face-to-Face Relationships. Sloan Management Review: Massachusetts Institute of Technology; 1981; Vol. 22(No. 2): pp 43-52.

In this paper, the author suggests that the key element to successful implementation of solutions to managerial problems lies in the improvement of face-to-face relationships. He discusses the factors involved in building and maintaining effective communication emphasizing the difficulties in achieving this in a cross cultural setting. He concludes by addressing the repair strategies and skills needed to mend damaged relationships.

HRM-Communication Skills.

READ/ GNL/ HRM/ HRM-1/ ENG/ Management style/ Cross cultural management/Negotiation/ Interpersonal communications/ INT.

214. Schein, Edgar H. Increasing Organizational Effectiveness through Better Human Resource Planning and Development. Sloan Management Review: Massachusetts Institute of Technology; 1977; Vol. 19(No. 1): pp 1-20.

This article focuses on two key issues: the increasing importance of human resource planning and development in organizational effectiveness; and how the major components of a human resource planning and development system should be coordinated for maximum effectiveness. The author describes the major components of human resource planning and illustrates how they are linked to each other. This system is diagrammed, accompanied by an explanation as to how it must be managed to insure coordination between the planning functions and the

implementation functions.

HRM-Manpower Planning.

READ/ GNL/ HRM/ HRM-7/ Management, general/ Management functions/
Manpower planning/ Organizational development/ INT.

215. Seims, Sara and Ken Heise (Family Planning Management Training Project). Kazanda Case. 1 ed. Boston, Massachusetts: Management Sciences for Health; 1987; 11 pp.

Case based on composite data from French-African programs public sector family planning program in a low contraceptive-prevalence country. The case presents a wide variety of management issues/problems and is a rich source for discussion. However, the case discussion needs to be structured. Short note on use of case included.

HRM-Management (General).

CASE/ HRM/ HRM-1/ HRM-2/ HRM-3/ HRM-4/ ENG/ FRE/ FP/ Family planning programs/ Public sector programs/ Implementation/ Access/ Planning/ Management, General/ FAF/ INT.

216. Sheldon, Alan (Ministry of Public Health, Government of Kuwait). Implementing the Problem Oriented Medical Record. Cambridge, MA: Harvard University; 1979; 8 pp.

This case discusses the implementation of an innovative medical record system. Appendices to the case illustrate the existing system and the proposed system. The reader is asked to analyze the barriers to implementing this change, as well as developing a strategy to manage the change. While the record system involved is not directly applicable to family planning, the concepts demonstrated by the case are relevant in any health setting. The case could also be adapted to more closely mirror the family planning delivery and record keeping systems.

HRM-Management of Change.

CASE/ HLTH/ HRM/ HRM-4/ ENG/ Management of change/ INT.

217. Sheldon, Alan (Ministry of Public Health, Government of Kuwait). The Introduction of Comprehensive Nursing Care in Kuwait. Cambridge, MA: Harvard University; 1979; 7 pp.

The subject of this case is the introduction of a new system of comprehensive nursing care in Kuwait. The concepts covered include: the management of change; reorganization; staff development; altering job descriptions; and new policies. In addition to the narrative, the appendices include: a statement on the philosophy and organization for comprehensive nursing care; and the nursing care plan.

HRM-Reorganization.

CASE/ HLTH/ HRM/ HRM-4/ ENG/ Management of Change/ Organizational Development/ Staff Development/ Job Description/ INT/ KUW.

218. Sheldon, Alan P., and others. Management of Health Organizations. Harvard Business Review; 1969; (21113).

HRM-Shelf.

HRM/ ENG/ INT/.

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219. Sheperd, Herbert. La Administracion a Traves de Objetivos (The Administration Behind Objectives); 5 pp.

The author stresses the importance of an administration coordinating or stabilizing its goals while having to deal with each employee having his/her own desires and goals.

HRM - goal stabilization.

TOOL/ GEN/ HRM/ SPA/ HRM - goal stabilization/ INT/.

220. Shipp, Peter (Management Sciences for Health). Teaching Exercise on Manpower Planning. Boston, Mass.: Management Sciences for Health; 1986; 3 pp.

This is a draft of a teaching exercise consisting of four sessions, each three and a half hours in length. The sessions are written for mid and senior level managers, and include: 1. the use of manpower projections; 2. projecting manpower requirements; 3. projecting manpower supply; and 4. the requirements/supply balance. Also included are a rationale, teaching objectives, content and a list of suggested materials.

HRM- Manpower Planning.

COURSE/ FP/ HRM/ HRM-7/ ENG/ Manpower planning/ Manpower projections/ Manpower supply/ INT/.

221. Silvo, Franco. PROPLAF Case. Boston, Massachusetts: Family Planning Management Training Project; March, 1987; Regional Training Institute report, March 1987; 10 pp.

Note: This is a series of Overheads.

This is a general Family Planning Management case used as an actual case in FPMT's training of trainers workshop to demonstrate how to use a case method. This is a complete set of overheads providing all the information needed to present the case. There are no teaching notes.

HRM-General Management.

CASE/ FP/ HRM/ MIS/ ENG/ Management/ Management information systems/ Organizational design/ INT.

222. Skagan, Anne. Workplace Literacy. NY, NY: AMA. Membership Publishing Division; c1986; 74 pp. (AMA Management Breifing); ISBN 0-8144-2325-6.

HRM-Shelf.

HRM/ ENG/.

223. Smith, Ken. An Intergroup Perspective on Individual Behavior; 12 pp.

In this paper, the author explores the forces affecting behavior between diferent groups. He asserts that intergroup processes; 1) profoundly color our perceptions of the world; 2) help define our individual identities; and 3) contribute significantly to the emergence of behavior patterns that we traditionally label as leadership. Three detailed scenarios illustrate the dynamics of the interaction between groups.

HRM-Organizational Behavior.

READ/ GNL/ HRM/ HRM-10/ ENG/ Organizational Behavior/ INT/.

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224. Soriano, Emily P., under supervision of Peter D. Garrucho Jr. Commission of Population: Regional Population Office (B). Manila, Philippines: Asian Institute of Management; 1976; 25 pp. Note: This case is contained in the AIM Casebook which contains other cases on the Philippine Family Planning Program.

In this case a Regional Population Officer in the Philippines is assessing the performance and the direction of the programs he is responsible for. A description is provided for each of the operational activities of the population office, detailing some of the current initiatives and some of the barriers affecting successful implementation of activities. The barriers identified include inadequate manpower and workspace, and difficulties in coordinating the efforts of the cooperating agencies participating in family planning activities. The Regional Officer feels that in spite of these problems, staff morale and motivation were still high. In assessing the situation, the Regional Officer is trying to determine if the activities of the Regional Population Office are contributing effectively to achieving the population objectives for the region and if he had defined the key tasks for accomplishing his Regional Population Office objectives. This case also touches on organizational design and participative management techniques. The case is supplemented by extensive data including: organizational charts; budgets; job descriptions; and data flow sheets. Trainers could use this case to illustrate how the lack of some elements of strategic planning can hinder operational activities. NB: There is a complementary case entitled, "Commission on Population: Regional Population Program (A)", by the same author. PLN-Shelf.

CASE/ FP/ HRM/ PLN/ HRM-1/ HRM-4/ PLN-2/ PLN-3/ PLN-4/ PLN-5/ ENG/ Manpower Planning/ Organizational Design/ Strategic Planning/ Participative Management/ PHI/ INT/.

225. Strachan, Deirdre, and David C. Korten. Clinica de Planificacion Familiar Guadalupe (Guadalupe Family Planning Clinic); 15 pp.

A case study about a beleaguered family planning clinic. HRM - family planning.

CASE/ FP/ HRM/ POL/ SPA/ INT/ family planning/.

226. Strachan, Deirdre and David C. Korten. The Guadalupe Family Planning Clinic (Part B). Korten, F. Francis and David C. Korten. Casebook For Family Planning Management. USA: The Pathfinder Fund; 1974; c1977: p31 - p48; 18 pp.

Note: This case is the second of twelve located in the Casebook For Family Planning.

The second of a two part series, this case focuses on a Nurse Educator in a Family Planning Clinic in Latin America. In the first case, the newly appointed Nurse Educator has decided to design a workplan in an effort to overcome the problems she is facing. In this case, we find the same Nurse Educator one year later. She has developed and implemented a workplan and now has a "model clinic". The reader is also asked to identify and

228. Tagiuri, Renato. Sobre la 'Buena' Comunicacion (About "Good" Communication); 6 pp.
The article deals with identifying poor communication between people and fixing the situation.

HRM - communication.

TOOL/ GEN/ HRM/ IEC/ HRM - communication/ SPA/ INT/.

229. Talpaert, Roger. Managing a Management Development Institution. Geneva, Switzerland: International Labour Office Geneva; 1982; c1982; 277 pp. (Kubr, Milan. Management Development Series; No. 18).

This book was written for anyone involved in designing, planning, managing, and supervising management development institutions. Part I includes chapters on: strategic planning and management links with the environment; recruiting and developing personnel; organizational development and program planning and control. Part II contains four case studies of management institutes in Geneva, Ireland, India, and Venezuela.

Shelf-HRM.

READ/ CASE/ GNL/ HRM/ HRM-1/ HRM-9/ HRM-10/ ENG/ Staff Development/ Organizational Development/ Supervision/ Personnel Recruitment/ INT/ VEN/ IDI/ IRR/ SWI/ RTI.

230. Thamhain, Hans J. and Lawrence H. Wortzel. Leadership, Conflict, and Program Management Effectiveness. Sloane Management Review; Fall 1977; 19(1): 69-89.

This article reports on a field investigation conducted to examine the key problems faced by project managers in managing complex tasks. The body of the article is a technical review of the findings. The concluding section is a number of recommendations to improve the effectiveness of the project manager. The final four pages might be useful to trainers in a discussion of management or leadership styles.

HRM-Management Style.

READ/ GNL/ HRM/ HRM-1/ ENG/ Management style/ INT.

231. La Toma de Decisiones Gerenciales - El Punto de Vista Gerencial (Managerial Decision Making - The Management Point of View); 38 pp.

The article is intended as an aid to managers in analyzing problems, deciding on a solution and effectively carrying out their decisions. Divided into the differences between personal and management decisions, defining a problem, formulating a solution, how to make a decision, how to implement it and verification of the results.

PLN.

TOOL/ GEN/ HRM/ POL/ PLN/ SPA/ INT/.

232. Training Resource Corporation. Session Builders - Series 200. Harrisburg, Pa.: Training Resource Corporation; 1986; 250 pp.

Note: Included in the box of exercises is a sheet listing very brief comments made by FPMT staff who have received and used some of the exercises.

This is a package of sixty exercises designed to be used by trainers. They are categorized according to the topic and the type of activity. The types of activities are defined as assessment, discussion stimulator, case study, role play, simulation and application. Topics covered by the various exercises include the following: active listening; assertiveness; communication; creativity; delegation; interviewing/selection; leadership; meetings; motivation; performance management; planning; problem solving; recognition; stress; team building; time management; training/orientation. Each exercise includes trainers notes on preparation, process, discussion ideas, and options or variations and information on the time required as well as the size of the group. There are masters for each of the handouts required for the exercise. Trainers will find that some of the exercises included in this series will need to be adapted for a non-U.S. audience and some may be unsuitable because of the verbal skills required.

Shelf-Ref.

EXER/ GNL/ HRM/ PLN/ HRM-9/ HRM-10/ HRM-1/ PLN-1/ PLN-5/ ENG/ Interpersonal Communications/ Delegation/ Decision Making/ Personnel Recruitment/ Coordination/ Personnel Selection/ Problem Solving/ Workplans/ Planning/ INT/ DOM/.

233. Vriesendorp, Sylvia (FPMT). Cases On Delegation - Those Terrible Numbers. Boston, Mass.: Management Sciences for Health; 1987; 2 pp.

This brief case focuses on issues of delegation faced by the director for family planning and MCH services in a district in an African country. The case includes some questions that can be used for discussion. This case is presented in a way that it can be easily adapted for a role play exercise. NB: There are teaching notes and a lesson plan to accompany this exercise located in the Ogun State LGA Workshop coursebook.

HRM-Delegation.

CASE/ ROLE PLAY/ FP/ HRM/ HRM-1/ HRM-9/ ENG/ Delegation/ AFR/ INT/.

234. Vriesendorp, Sylvia (FPMT). Cases on Delegation - The Busy Schedule. Boston, Mass.: Management Sciences for Health; 1987; 2 pp.

This brief case focuses on the problems of a director of Family Planning and MCH program in Africa. Her schedule is too busy for her to be able to complete all of her duties and she decides to delegate some of the work to a subordinate. The case includes study questions. It is set up in a way that it could be used as a role play. NB: There are study questions and a lesson plan to accompany this case located in the Ogun State LGA Workshop

coursebook.

HRM-Delegation.

CASE/ ROLE PLAY/ FP/ HRM/ HRM-1/ HRM-9/ Delegation/ AFR/ INT/.

235. Vriesendorp, Sylvia (Family Planning Management Training Project). The Visit. Boston, Massachusetts: Management Sciences for Health; 1987; 2 pp.

Problems resulting from poor coordination are the subject of this brief case set in Africa. A senior health sister from the Ministry of Health has recently been transferred to a local government administration clinic. While her major responsibility is the supervision of nine outlying clinics, she is also in charge of service delivery at the main clinic. A number of logistical problems have interfered with her planned supervisory and supply visits to the rural clinics, and she is trying to determine how they might have been averted and what steps to take to prevent them from recurring. Study questions accompany the case.

HRM-Supervision.

CASE/ FP/ HRM/ HRM-9/ PLN-2/ ENG/ Supervision/ Logistics/ Problem solving/Coordination/ AFR/ INT/.

236. Walton, Richard E., Leonard A. Schlesinger. Do Supervisors Thrive in Participative Work Systems?: AMACOM, American Management Association; 1979; 13 pp.

This article presents findings on supervisors who work in a participative management system. It discusses the nature of the problems that arise from this system, theories on how supervisors and work groups can interact, and some of the implications for the management of organizations. A list of seventeen statements of what the supervisor is expected to do in a hierarchical management system is given, followed by a description of how these supervisory functions can be incorporated into a participative system. The article concludes with an analysis based on the experiences of twelve manufacturing plants, of how the transition to a participative work system is impeded.

HRM-Self/Participative management.

READ/ GNL/ HRM/ HRM-3/ HRM-9/ ENG/ Self management/ Supervision/ INT.

237. Walton, Richard E. (Harvard Business School). Map of the HRM Territory. Managing Human Assets: The Groundbreaking Harvard Business School Program; 1984.

This brief article is written as an introduction to a course on human resource management. A diagram that maps the determinants and consequences of HRM policies is the focus of this reading. The map shows that HRM policies are influenced by two major considerations: situational factors and stakeholder interests. The author then gives four criteria for evaluating the effectiveness of policy options that should lead to favorable consequences for the individual, society, and the organization.

HRM-Policies.

Read/ GNL/ HRM/ HRM-6/ MANAGEMENT, GENERAL/ Operating procedures/ INT.

238. Ware, James. Some Aspects of Problem Solving and Conflict Resolution in Management Groups. New York: McGraw-Hill; 1983; 14 pp.

This reading discusses different approaches to group problem solving. The author identifies three styles: smoothing and avoiding; confrontation problem solving; and bargaining and forcing. Each style is discussed and analyzed and the reading concludes with several basic strategies that can be utilized by managers to effectively influence group behavior.

HRM-Managing Conflict.

READ/ GNL/ HRM/ HRM-1/ Management of Groups/ Management Style/ Conflict Resolution/ INT.

239. Weick, Karl E. Organization Design: Organizations as Self-Designing Systems; 1977; 15 pp.

Detailed article on the concept of self-designing systems as a form of organizational design. The Apollo-3 Mission is used as a clear example of how a self designed system has the potential of increasing organizational effectiveness. The author discusses in detail the characteristics and the principles of self-design. Although the Apollo example is culturally specific, it clearly illustrates the concepts highlighted by the article.

HRM-Organizational Design.

READ/ GNL/ HRM/ HRM-10/ ENG/ Organizational Design/ Organizational Development/ DOM.

240. Weisbord, Marvin R. Organizational Diagnosis: A Workbook of Theory and Practice. Reading, MA: Addison-Wesley; 1978; 41 pp.

This workbook is designed to help the reader develop skills to perform an organizational diagnosis. It contains a fourteen step process that asks the reader to fill in information about an organization that he is familiar with. The steps form a clear, sequential analysis of the organization, allowing the reader to identify some of the factors influencing effectiveness and some strategies for improvement. Trainers could incorporate this material into a course or model on organizational design, using health care organizations as the model for the analysis.

HRM-Organizational Diagnosis.

EXER/ TOOL/ GNL/ HRM/ HRM-10/ ENG/ Organizational Development/ INT.

241. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). Leaving Nothing To Chance. Boston, Massachusetts: Management Sciences for Health; 1987; 3 pp.

Note: This case is currently under development.

In this case, the Executive Director for the National Family Planning Program is formulating a workplan for her activities during the next several months. The information provided gives the reader a clear sense of the director's management style and how effective she has been to date. The training objective for the case is to understand the relationship between management

style and program effectiveness. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ HRM/ HRM-1/ ENG/ Management style/ Program effectiveness/ INT/.

242. Wolff, James & Robert Cushman & Florida Kweekah (Family Planning Management Training Project). The Royalton Monthly Supervisory Meeting. Boston, Massachusetts: Management Sciences for Health; 1987; 5 pp.

A monthly supervisory meeting for CBD family planning workers is the subject of this case. The meeting is described in some detail with an exchange of dialogue between the supervisor and several of the distributors. During the meeting, the supervisor introduces the concept of self-evaluation to be pursued at the next meeting. The reader is asked to describe the supervisor's style, noting the techniques she uses to encourage participation and to improve performance. The objectives of this case include: understanding the importance of conveying an organization's mission to its employees; identifying and understanding the components of effective supervision; and understanding how a supervisor can use information and specific targets to improve performance. N.B. This is one of nine cases that focuses on various aspects of the family planning program described in this case.

CASE/ FP/ HRM/ HRM-1/ HRM-9/ ENG/ Management style/ Supervision/ Management of groups/ Team building/ INT/.

243. Wolff, James, Robert A. Cushman, C. Elizabeth McGrory, Florida Kweekah. Beyond The Clinic Walls: Cases Studies in Community-Based Distribution. C. Elizabeth McGrory ed. Boston, Massachusetts: Family Planning Management Training Project; 1989; 92 pp. (Linda Sutfenfield).

Note: This case book is one in a series of four handbooks for managers of family planning programs. Beyond the Clinic Walls contains a series of case studies which depict the management issues a family planning organization faces in designing and implementing a new community-based distribution program. Divided into four parts, the book includes sections on: planning; management information systems; supervision; and compensation of workers and the pricing of contraceptives. Each section begins with a discussion of the major management issues which the case(s) in that section address, and an introduction to the concepts to be used in analyzing the cases. Each case is followed by an analysis which addresses the major themes presented in the case, and by study questions. These analyses should help to stimulate and guide discussion about the cases and questions. The cases book is intended for use in training programs or self-instruction for managers of community-based distribution of family planning services.

TOT-shelf.
CASE/ FP/ HRM/ MIS/ LOG/ ENG/ CBD Programs/ INT/.

244. World Health Organization. Family Planning in the Education of Nurses and Midwives. Geneva: World Health Organization; 1973; 50 pp. (Public Health Papers; 53).

One of a series of Public Health Papers published by the World Health Organization, this book addresses the need for family planning training as a component of the education of nurses and midwives. The book is divided into three chapters which are written to help prepare nurses and midwives to "acquire the knowledge, skills, and attitudes necessary to allow them to participate effectively in the planning, programming, and delivery of family planning services. Chapter 1 is on the team approach to family health services. The second chapter is on the functions of nursing and midwifery personnel, and the final chapter is on education and training. This chapter details the importance of keeping personnel up to date in their training and includes sections on: methods of teaching and learning; integration of content; the learning process; and evaluation of education and training. This book should provide managers with information and inspiration to ensure that personnel have the appropriate level and mix of training and to aid in planning a staff development program.

HRM-Shelf.

READ/ FP/ HRM/ HRM-5/ EIC/ ENG/ FRE/ SPA/ Staff Development/ In-service Training/ Family Planning Education/ BB/ INT.

245. World Health Organization. Strengthening Ministries of Health for Primary Health Care; 58 pp.

"This comprehensive publication offers general concepts intended to stimulate exploration on ways to strengthen Ministries of Health. It presents approaches to the analysis of Ministries of Health, organizational options for the implementation of primary health care, and some general ideas on planned processes of organizational change."

PLN-Needs Assessment.

READ/ HLTH/PLN/ HRM/ PLN-4/ PLN-5/ PLN-6/ ENG/ THA/ YEM/ FIN/ MOZ/ CHL/ GHA/ INI/ PHI/ SUD/ SRL/ TUR/ INT/ Needs Assessment/ Public Sector Programs/ Government Agencies/ Ministry of Health/ Political Bodies/ Organizational Development/.

246. Zurcher, Louis A. (University of Texas at Austin). Use of Behavioral Science and Technology: an International Perspective. The Journal of Applied Behavioral Science; 1983; 19(Numbers 2, and 3).

Note: Special Issue, 2 volumes.

HRM-Shelf.

HRM/ ENG/.