

PNABQ 809

**JAMAICA MIS WORKSHOP AND
TECHNICAL ASSISTANCE: NATIONAL
FAMILY PLANNING BOARD**

NOVEMBER 3 - 19, 1993

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FAMILY PLANNING MANAGEMENT DEVELOPMENT

Project No.: 936-3055
Contract No.: DPE-3055-Q-00-0052-00
Task Order No.: JANFP

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I. EXECUTIVE SUMMARY

As part of its ongoing technical assistance in Management Information Systems to the National Family Planning Board (NFPB) of Jamaica, the Family Planning Management Development (FPMD) project, conducted a workshop on key MIS concepts and applications for Senior and Mid-level Managers of the NFPB.

The workshop reviewed basic definitions of system components; the organizational environment for MIS at the NFPB; organizational and departmental information needs; organizational objectives, activities, and indicators for measuring progress towards objectives; and data collection, processing, and information use. Finally, NFPB staff designed report forms which could be used to track departmental activities. The synthesis of the workshop activities produced a document which could serve the NFPB as the framework for the operational plan for the institution. In the final sessions, participants discussed the need to integrate the workshop experience into their ongoing operational planning activities.

In follow-up to the MIS workshop, and previous FPMD work on the design, installation, and training in the use of ServStat, FPMD will continue to provide technical assistance and training to the Board over the next twelve months. Activities will include: the finalization of ServStat, including online help and prompt functions; the integration of a graphics capability; the complete written documentation of the program; as well as the design of the additional modules recommended for an integrated MIS, including financial and programmatic information.

FPMD will participate in the February 1994, Family Planning Initiatives Project CAs Meeting by presenting planned support to the NFPB for the Board's fiscal year, April 1-March 30, 1995.

II. BACKGROUND

The Family Planning Management Development (FPMD) project of Management Sciences for Health (MSH), at the request of USAID/Jamaica under the Family Planning Initiatives Project, is providing technical assistance in management information systems (MIS) to the Jamaican National Family Planning Board (NFPB). The first concentrated effort in MIS by FPMD was a needs assessment carried out in January-February of 1993. The needs assessment led to the identification of MIS-related activities to be carried out in two phases. Phase One and Phase Two activities are reviewed below as well as discussed in Section IV, Future Activities.

During 1993 and early 1994, Phase One activities have focused on two specific outputs: the development and implementation of a computerized service statistics system, and the implementation of an MIS Workshop with NFPB upper and middle level managers to sensitize them to the importance of management information systems for effective organizational performance.

Based on specifications developed during the initial needs assessment visit, the first major Phase One activity: design of a computerized system for data entry, processing and maintenance, and reporting of family planning service statistics of the MOH and other important NGOs providing family planning services, took place in Boston from February through May, 1993.

The system was given the name "ServStat" and was developed using the FoxPro database package, with the programming support of FPMD. The initial version of ServStat was installed at the NFPB during FPMD consultant Kip Eckroad's TDY of June 27th-July 8, 1993. During this same TDY Mr. Eckroad reviewed the system being used at the MOH/HIU and together with representatives from the NFPB and the MOH developed the mechanisms for transferring the data (timing, export functions, etc.) from the HIU to the NFPB. The Statistics Unit staff was provided a basic training in the use of the system, data entry, edit and reporting functions as well. Using first quarter data from 1993, made available by the MOH, Mr. Eckroad provided initial training in data manipulation and reporting. Initial, basic documentation of the system was developed and submitted to the NFPB in FPMD's trip report of July, 1993, with the understanding the NFPB Statistics Unit would continue working with the system and provide FPMD feedback on any required adjustments.

The second important activity in Phase One of FPMD's technical assistance to the NFPB, the MIS workshop, took place November 8-19, 1993 in Kingston, Jamaica, the results of which are reviewed in this report.

Phase Two activities will include several additional areas of systems development. FPMD will assist in the development of a computerized accounting and financial management system, once the basic parameters and procedures have been specified in

the work being carried out by Ernst & Young (formerly Pannell Kerr Forster). Work will continue on additions and refinements to the ServStat system and integration of supplementary service information from other sources. Efforts will be made to construct an executive information system (EIS), integrating key variables from different sources and different functional areas into a single, user friendly interface for decision-making by senior NFPB officials. Phase Two will also include ongoing MIS technical assistance and training, with the possibility of a second workshop which focuses on the use of information from the systems which have been implemented.

III. PURPOSE/SCOPE OF WORK

While the central purpose of this trip was to conduct the MIS workshop senior and middle management of the NFPB, FPMD staff also upgraded the ServStat system with a more flexible reporting function, imported the third quarter 1993 data from the MOH/HIU, and provided additional technical assistance to Statistics Unit staff in the use of the system.

A. MIS Workshop

The objective of the first area of activity was to plan, prepare, and implement an MIS workshop for the Jamaica National Planning Board. This activity comprised:

- planning the sessions to be included in the workshop,
- preparing the training materials needed for the workshop,
- making all the logistic arrangements for the workshop,
- training and coordinating guest trainers,
- providing any additional support as required.

B. MIS Technical Assistance

The objective of the second area of activity was to provide ongoing Technical Assistance in the different components of the MIS plan. Specific activities of interest included:

- implementation of the latest version of ServStat and assessment of current use,
- liaison with Ernst & Young on the financial management information system and identification of next steps,
- other information systems such as the one for planning and monitoring of activities.

IV. DESCRIPTION OF ACTIVITIES

A. MIS Workshop

The **preliminary preparation** of the MIS Workshop for the NFPB took place over a two-day period in July, 1993, when Nancy Murray, Kip Eckroad, and Margaret Watt of MSH, together with Mary Schauer of the Centers for Disease Control and Prevention (CDC), held planning meetings at MSH/Newton. These meetings served to identify the workshop's goals, schedule, session objectives, and activities, as well as the roles and responsibilities of the trainers. The output of the planning meetings was faxed to the NFPB for their comments and approval, which resulted in changes to the schedule and to the suggested groupings of participants. Once the session guides and schedule had been finalized, the trainers continued their work at MSH, planning the sessions in more detail, purchasing the workshop materials, putting together the workshop binders, and making the logistical preparations (room, board, conference rooms, etc.).

The workshop took place from November 8th through 19th, at the Wyndham Hotel in Kingston. The principal trainers, Kip Eckroad and Margaret Watt, arrived in Kingston on November 3rd, 4th and 6th, respectively. Jack Graves (CDC) arrived on the 7th; Mary Schauer and Nancy Murray, on the 14th of November. To encourage participation from everyone in a close working environment, as well as to minimize the disruption of the NFPB's daily activities, the workshop was broken into two phases. All the participants attended the opening and closing sessions together, but the participants were grouped into Group A and Group B (each representing all the key aspects of the NFPB's work) for attendance at the key sessions, which took place during Week 1 and Week 2, as follows:

Week 1

Monday, November 8th:	Session 1, half day, all participants
Tuesday, Nov. 9th:	Session 2, full day, Group A only
Wednesday, Nov. 10th:	Session 3, full day, Group A only
Thursday, Nov. 11th:	Session 4, full day, Group A only

Week 2

Monday, Nov. 15th:	Session 2, full day, Group B only
Tuesday, Nov. 16th:	Session 3, full day, Group B only
Wednesday, Nov. 17th:	Session 4, full day, Group B only
Thursday, Nov. 18th:	Session 5, full day, all participants
Friday, Nov. 19th:	Session 6, half day, all participants

Session 1, "Introduction to the MIS Workshop," served as an introduction to the course, the trainers and participants, and the overall concept and definition of MIS. The session ended with a guided discussion of the NFPB's strategic plan and its implications for MIS development and use.

Session 2, "Organizational Environment for MIS," looked at the management structures of the NFPB, as these are critical to an understanding of MIS needs and definition of information flow. The participants defined the overall purpose of the NFPB, its major functions, and the functions and activities carried out by the key structures (departments, units) within the institution. An exercise aimed at defining the official and the informal organizational chart generated much discussion and pointed to a need for further clarification of reporting and supervisory lines. In parallel to small-group discussions of the functional areas of the NFPB, there were presentations of various functional components of an MIS (i.e., finance, logistics, service statistics).

Session 3, "Definition of Information Needs," built on the previous sessions to begin defining the overall information needs of the NFPB. The session began with a presentation on targets and indicators, and was followed by a case study demonstrating the type of information collected in a service statistics system. The case study provided participants with a practical experience in identifying the key information needs, critiquing the information reported, identifying improvements to reporting outputs, and using the improved reports to identify management issues. The participants then identified the key indicators for the activities they had previously outlined for the various functional areas of the NFPB.

Session 4, "Data Collection, Processing, and Information Use," began with an exercise on the presentation and analysis of information, using NFPB service statistics and logistics data. NFPB staff analyzed and graphed this data using the FPMD *Family Planning Data Manager* Wallchart, a supplement to *The Family Planning Manager* Issue, "Using Service Data: Tools for Taking Action (Volume I, No. 2)." In small groups, the participants then used the indicators defined in Session 3 to draft sample reports that met the management needs of the NFPB, building on their knowledge and their experience from the previous sessions. During Week 2, Group B was given both the list of indicators and the sample reports developed by Group A, in order to benefit from the previous group's work as well as to improve it based on their own ideas. The sample reports developed by Group B, therefore, built on Group A's reports.

Sessions 5 and 6 brought both groups back together to synthesize their outputs; a process which allowed continual improvement and insight from both groups. As a result of these sessions, the participants developed a document that could be used as an outline of an implementation plan, covering general objectives, departmental objectives, activities, and indicators, and to which could be added timeliness, responsibilities, and resources.

The details of the sessions and reading material are available in the workshop binder.

Debriefing meetings were held at USAID/Kingston during the workshop recess, with Betsy Brown, and with key NFPB staff, on Thursday, November 18th.

B. MIS Technical Assistance

Certain modifications were made to the ServStat software since it was installed in July, 1993. These modifications consisted primarily in changing the report utility from "FoxFire" to "R&R Report Writer" which, it was felt, would provide improved performance and increased user flexibility to design new and modify existing reports. The modifications did not include the additional utility and help functions which are still pending.

At the time of the visit the new computer system designated for service statistics had arrived but was still in the boxes at the NFPB offices. Discussions were held on the location of the system; preparations were made in the statistics office to provide adequate space; and the computer and printer was installed and tested. It was noted that additional software, not included with the computer, would be needed to provide maximum utility to the use of ServStat. FPMD/Boston was able to purchase copies of FoxPro (for DOS and Windows) and R&R Report (for DOS) and have them delivered to Jamaica in time for installation on the final day of the consultancy.

The entire system, including ServStat, was installed and Statistics personnel were given minimal instructions in the modifications. There did not appear to have been much use of ServStat between its installation and the current visit; it is hoped that having the system installed in the Statistics office will encourage more frequent use and experimentation. It must be noted, however, that NFPB Statistics staff had received training in FoxPro since the original ServStat installation. This training will undoubtedly serve them well when they get to the phase of more advanced analysis of ServStat data.

In a separate activity, in response from a request by the NFPB's Director of IEC for assistance in thinking through the activity planning process, an FPMD consultant guided the IEC staff through a structured exercise of "entity-relation" modeling. The exercise helped to specify the types of information which are relevant to the activity planning and monitoring process. Examples were elaborated to provide sufficient detail of a technique which could be used for the planning process, and which could also be used as a basis for an MIS which monitors all activities planned and implemented by NFPB.

As a final follow up activity, several discussions were held with Ernest & Young with respect to the status of the accounting and finance procedures manual for NFPB. Apparently final versions of the manual are close to completion but the final copy was not available by the end of the consultancy.

V. FINDINGS AND RECOMMENDATIONS

A. Organizational Structure

One of the initial workshop exercises was to define the organizational chart of the NFPB as the staff believe it to be structured, and to modify it based on informal lines of communication, supervision, and reporting. This exercise was done with three separate small groups during Weeks 1 and 2. While the results varied from group to group, as could be expected, the majority of the groups drew charts that reflected a good many unofficial reporting lines that are commonly used.

This exercise was not intended as an organizational development effort, but rather as a means of identifying information flow for MIS development. It pointed, however, to a need for clarification of roles and responsibilities, which the NFPB may wish to address at some point in the future.

B. Activity Planning and Monitoring

The MIS workshop, together with the request for assistance by IEC has reinforced the initial Needs Assessment finding that "activity planning and monitoring" make up an important part of what NFPB does and, hence, its information needs. This makes up an important part of the IEC-World Bank project, but it also highlights a need for the overall organization. This increases the priority to identify a system for specifying and monitoring all budgeted activities of the NFPB. As such, FPMI should assist in the development of an MIS which will respond to this area of need. This area will receive increased attention in future visits, along with the Financial MIS module.

C. Workshop Evaluation

Participants were asked to evaluate the workshop by session, and in terms of the overall educational and administrative aspects. Participants were asked to identify themselves in terms of which group they had participated in, as these had different instructors. They were asked to evaluate each component listed in Table A, which had a maximum value of 5. Overall, participants rated the sessions as good, to excellent, and both trainers as knowledgeable and able to present their subject matter clearly. Some participants had already been exposed to MIS theory, while others were hearing about it for the first time. Hopefully, this workshop has served to lessen differences in understanding of key MIS concepts between NFPB staff.

TABLE A. EVALUATION RESULTS OF MIS WORKSHOP FOR THE NFPB

Aspect Evaluated	Group A (n=6)	Group B (n=7)	Not identi- fied (n=9)
Educational Aspects: Overall Course	3.7	3.6	3.2
Session I. Introduction to MIS Workshop	2.8	3.6	6.5
Session II. Organizational Environment for MIS	3.6	3.4	3.6
Session IIB. Organizational Environment for MIS (p.m.)	3.4	3.5	3.5
Session 3A. Definition of Information Needs (a.m.)	3.5	3.7	3.7
Session 3B. Definition of Information Needs (p.m.)	3.4	3.5	3.6
Session 4A. Collection, Processing and Info. Use	3.4	3.4	3.4
Session 4B. Collection, Processing, and Info. Use	3.4	4.0	3.5
Session 5. Consolidation of Results	3.3	3.5	3.3
Session 6. Wrap-Up and Conclusions	3.8	3.6	3.5
Administrative Aspects	4.3	3.3	4.0
Trainer: Kip Eckroad	4.0	4.0	4.1
Trainer: Margaret Watt	3.9	4.2	3.8

VI. FUTURE ACTIVITIES

A. Next Version and Training - ServStat

There are essentially three areas related to the ServStat module on which FPMD technical assistance must focus. The first, is to finish the software and deliver a system that meets the basic specifications including the utilities, help facilities, and graphics capabilities required by the Board to analyze and present this important data both quarterly and annually. The second, is to provide comprehensive training to NFPB Statistics staff in the operation of ServStat software. Thirdly, all NFPB staff should be trained in the use of the output reports from the ServStat system.

FPMD will continue to refine the Software in Boston, in discussion with the NFPB. FPMD will also design a prototype of a quarterly/annual statistical report using the data from the first three quarters of ServStat to track achievements as against the Strategic Plan developed by the Board, for discussion with NFPB staff.

B. Analysis of Accounting Procedures Manual (Define Next Steps)

A copy of the results of the Ernest & Young procedures manual should be made available to FPMD as soon as possible in order to allow the project to understand current thinking on this important management issue. Upon receipt of this manual FPMD should enter in discussion with Ernest & Young and begin to specify steps to be undertaken for the computerization of this system.

C. Identification of Data to Include in EIS

The identification of parameters for the design and implementation of an Executive Information System (EIS) should continue to be a priority for work of the next couple of visits. It is important to begin to identify the variables which an EIS should monitor, and to define the format in which this data should be presented. FPMD has had several discussions with Future Group about the use of geographical information systems (GIS) and the are other formats which should be considered.

ANNEX A. Operational Plan

NFPB OBJECTIVES BY DEPARTMENT OR FUNCTIONAL AREA

A. Direction

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
1. To establish FP policy directives and assure their implementation.	System for implementing, recording, monitoring and evaluating policies submitted to the Board.	Recommend policy, submit to Board, implement, follow up, document.		
2. To direct and coordinate the activities of all departments of the NFPB.	Departmental plans based on annual plan, used to measure output against projections. Staff evaluation of coordination activities.	<p>Strategic Plan: Collate activity of each dept. by year.</p> <p>IEC/Training: -Review courses planned, reports to donors, NFPB, etc., staff and human resource development</p> <p>IEC/F.S.: -Review logistics, recruitment, outreach programs, coordination of activities</p> <p>IEC/Communic: -Monitor logistics, programs, target groups, mass media, etc.</p>		<p>↑ ↓</p> <p>From indiv. depts ↓</p> <p>Direct. ↓</p> <p>Indiv. depts.</p>
		<p>Serv. Delivery: Program activities planned, executed, output</p>		
		<p>Warehousing: -Stocks available -Contraceptive logistics mgmt</p>		

B. Projects, Research, and Statistics

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To provide requested and other useful information for the NFPB's programme planning process.</p>	<p>Timely presentation of data/info: quarterly, annual reports.</p>	<p>Provision of quarterly and annual reports on FP activities.</p> <p>Liaise with other agencies in conducting qualitative and quantitative research.</p> <p>Info sharing with agencies in field of pop and FP planning (e.g., STATIN, PIGJ, UNFPA, USAID).</p>		<p>Serv. deliv., IEC</p> <p>MOH, STATIN</p> <p>Public Rel.</p>
<p>2. To ensure the effective implementation, monitoring, and evaluation of special projects.</p>	<p>Planned vs accomplished.</p> <p>Cost-effectiveness for the provision of information.</p>	<p>Site visits.</p> <p>Review financial statements and operational reports.</p> <p>Convene quarterly tripartite meetings.</p>		

NB: Dissemination should be more explicit.

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
		PR&S: -Surveys, prevalence rates, reports & activities, data; USAID, AVSC & JPHP projects		
		Personnel/Admin: -Staff performance, working conditions, benefits, policies, resource dev't		
		Accounts: -Monitoring of cash flow, financial statements, program budgets		
3. To ensure the sustainability of the NFPB.		Cost recovery. MOH support. Follow-up. New initiatives for foreign exchange securement. Follow through on agreements (divestment)	*(see note)	need to strengthen links w/ other depts, PR and Exec.Dirs.
4. To establish and maintain the NFPB as the lead agency for FP in Jamaica.		Advocacy. Sustainability.		

NB: Cost recovery must be defined clearly before identifying indicators.

C. Information, Education, Communication

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
1. To educate males regarding their role in FP decision-making.	<p>No. seminars done.</p> <p>No. persons reached.</p> <p>Increase in demand for male methods (clinic records).</p> <p>Increase in awareness (via CPS, follow-up, outreach).</p> <p>Reports from monitoring seminars (quant. and qual.) from field officers and volunteers.</p>	<p>Logistics planning.</p> <p>Recruitment of participants.</p> <p>Implementation of programme.</p> <p>Evaluation activities. (examples given)</p>		<p>2-way info flow</p> <p>Need serv deliv stats</p> <p>PR&S</p> <p>Public relations, media</p>
2. To motivate women in the high-fertile age group to accept a contraceptive method.				"
3. To provide information through the various media aimed at dispelling FP myths and misconceptions.				"

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
4. To educate a cadre of adolescent peer counsellors to disseminate FP and sexuality information.	<p>Age at first preg.</p> <p>Incidence of preg. in exposed communities and schools (compare to baseline survey) - CPS study.</p> <p>Increase in demand for programmes.</p> <p>No. persons reached.</p> <p>Increase in knowledge (pre-pos: test, focus group).</p> <p>Increase in demand for educational materials.</p>	<p>Logistics.</p> <p>Recruitment.</p> <p>Implementation.</p> <p>Evaluation.</p> <p>(ex's given)</p>		"
5. To provide information and FP methods to residents of high-fertility areas as a means of changing their attitudes and practices.				"

NB: Issues raised include: IEC's role in encouraging shift from public to private sector; role in selling training activities; role in coordinating with other public-sector campaigns (and supplies)

D. Service Delivery

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To ensure the provision of high-quality public-sector FP services to persons at risk for pregnancy or facilitating pregnancy.</p>	<p>Annual data on target population (from STATIN).</p> <p>Monthly service data by parish and by method (from hospitals, clinics).</p> <p>Monthly data on new acceptors by parish and method (MCSR).</p> <p>CYP and CPS annually.</p>	<p>Evaluation.</p> <p>Referrals.</p> <p>Client education.</p> <p>Liaison w/ MOH.</p> <p>Service delivery.</p> <p>Coordination.</p> <p>Method mix.</p>		<p>PR&S</p> <p>MOH</p>
<p>2. To ensure continuity of use of contraceptive methods in the public sector and to support continuity in the private sector.</p>	<p>No. counselled and no. visits by parish, monthly.</p> <p>Quarterly drop-out rate by parish.</p> <p>CPS (5 yrs).</p>	<p>Client education.</p> <p>Staff training.</p> <p>Supply cycle.</p> <p>Method mix.</p> <p>Referrals.</p>		<p>IEC</p>
<p>3. To support that public-sector clinics are equipped and that public and private clinics have trained staff to encourage the achievement of the desired method mix.</p>	<p>Annual needs assessment reports by VSC and FP coordinators.</p> <p>Monthly usage rates by method and parish.</p>	<p>Staff training.</p> <p>Supplies.</p> <p>Repair & maintenance of VSC equipment.</p> <p>Assist IEC with content for educational materials.</p>		<p>Admin/warehse</p> <p>IEC</p>
<p>4. To ensure the availability of adequate stock levels of desired contraceptives on a timely basis and the effective management of supplies at the clinic level.</p>	<p>Monthly central and peripheral data on stock balance.</p> <p>Usage rates by method and parish.</p> <p>Quarterly statement of expenditure and report on availability of funds.</p>	<p>Training in supply management for staff.</p> <p>Identify products, quantities and times for procurement.</p> <p>Top-up system.</p>		<p>Admin/warehse</p>

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
5. To develop, plan, and manage budget allocations to meet programme outputs effectively.		Liaison with Budget dept. Allocate funds. Monitor budget. Identify innovative approaches to improve cost-effectiveness and cost recovery.		Admin/finance

8E. Administration

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To ensure that personnel are recruited promptly and adequately.</p>	<p>Vacancy rate and average time post is unfilled.</p>	<p>Prompt advertisement of vacant post.</p> <p>Shortlist applicants and arrange interviews.</p> <p>Select and appoint best applicant given experience and qualification.</p> <p>Ensure proper orientation.</p>		
<p>2. To ensure that the environment and conditions under which all staff work are of the best acceptable standard.</p>	<p>Attrition rate (from personnel records and exit interview).</p>			
<p>3. To ensure the continuous availability of goods and services for the smooth running of the organization.</p>	<p>Inventory control.</p> <p>Level of depreciation of assets.</p> <p>Timeliness of response to requests.</p> <p>Downtime.</p>	<p>Purchasing and distribution of equipment, contraceptive supplies, stationery, etc.</p> <p>Maintenance of property, vehicles, equipment.</p>		

F. Finance and Accounts

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To produce accurate, timely information on all financial transactions.</p>	<p>Time lag between submission of bills and payment.</p> <p>Accounts payable data.</p> <p>Commitments info by length of time.</p> <p>Regular audit tests/reports.</p>	<p>Prepare payment documents as authorized.</p> <p>Record payment promptly.</p> <p>Keep analysis books (cash book, ledgers).</p> <p>Record documents for payment/ receipt.</p> <p>Complete bank reconciliations within 3 weeks of month's end.</p> <p>Prepare final accounts and required statements by programme areas and line item.</p>		
<p>2. To ensure prompt payment as authorized, in accordance with the approved budget and accepted financial controls.</p>	<p>Bank reconciliation completed by specific date.</p> <p>Ad hoc examination of sample documents to determine compliance.</p> <p>Regular audit tests reports.</p>	<p>Complete and regularly update commitments register.</p> <p>Update accounts payable records.</p> <p>Pay bills as authorized.</p>		
<p>3. To monitor funds flow for budget control.</p>				

ANNEX B. Participant List

GROUP A

Mrs. Beryl Chevannes, Executive Director
Dr. Olivia McDonald, Medical Director
Mrs. Janet Davis, Director, IEC
Mrs. Ellen Radlein, Director, Projects, Research and Statistics
Mr. Barrington Gordon, Director, Finance
Mrs. Beverly Taylor, Assistant Administrator
Mr. Dudley McFarquhar, Assistant Director, IEC (Training)
Mrs. Marion Kenneally, Advocacy Specialist
Mrs. Bethgee Stephenson, Senior Statistical Officer
Mr. Augustus Davidson, Executive Officer (Stores)
Mr. Augustus Moody, Internal Auditor
Mrs. Vivienne Soares, Statistician

GROUP B

Mr. Lennox Deane, Deputy Executive Director
Mrs. Joy Crawford, Public Relations Officer
Mrs. Rhoda Stamp, Assistant Director, IEC (Communication)
Mr. Earl Reddie, Project Officer
Mr. Easton Josephs, Statistician
Mr. Pedro Henry, Senior Accountant
Mrs. Terry Miller, Administrative Officer
Mr. Wayne Gordon, Storekeeper
Mrs. E. McFarquhar, Family Planning Co-ordinator
Mr. Victor Thompson, Project Administrator
Mr. Cedric Lewin, IEC

ANNEX C. Workshop Schedule

SESSION 1 - "INTRODUCTION TO MIS WORKSHOP"

(Half-day, all participants)

Overview and Introduction
MIS Concepts and the Management Cycle
MIS Implications of NFPB Strategic Plan

SESSION 2 - "ORGANIZATIONAL ENVIRONMENT FOR MIS"

(Full day for each group)

"Management Mis-information Systems"
Organizational Objectives, Roles and Responsibilities, Activities and Functions
Components of an MIS (e.g., Logistics, Finance, Service Statistics)
Departmental Objectives, Roles and Responsibilities, Activities and Functions
Outputs: Descriptions of organization, departments, individuals

SESSION 3 - "DEFINITION OF INFORMATION NEEDS"

(Full day for each group)

Targets, Monitoring and Evaluation
Exercise on Defining Information Needs (VIVAS case study)
Definition of Information Needs of NFPB
Identification of Operational Indicators
Outputs: Index of program output; Operational indicators

SESSION 4 - "DATA COLLECTION, PROCESSING, AND USE"

(Full day for each group)

Presenting Information: Charting Exercises
Report Design
Outputs: Sample reports; Information flow

SESSION 5 - "CONSOLIDATION OF RESULTS"

(Full day, all participants)

Presentations of Results and Discussion

SESSION 6 - "WRAP-UP AND CONCLUSIONS"

(Half-day, all participants)

Summary of Workshop
Discussion of Next Steps
Identification of Responsible Persons and Timeline
Workshop Evaluation

CALENDAR FOR MIS WORKSHOP AT NFPB

	Monday	Tuesday	Wednesday	Thursday	Friday
WEEK 1	<p><u>12-1:30 pm:</u> Opening luncheon</p> <p><u>1:30-5 pm:</u> Session 1 Groups A & B</p>	<p><u>8 am-12:15:</u> Session 2 Group A</p> <p><u>1:15-4:30 pm:</u> Session 2, cont'd Group A</p>	<p><u>8 am-11:30:</u> Session 3 Group A</p> <p><u>12:30-4:30 pm:</u> Session 3, cont'd Group A</p>	<p><u>8 am-12:</u> Session 4 Group A</p> <p><u>1-5 pm:</u> Session 4, cont'd Group A</p>	[Trainers prepare for Group B]
WEEK 2	<p><u>8 am-12:15:</u> Session 2 Group B</p> <p><u>1:15-4:30 pm:</u> Session 2, cont'd Group B</p>	<p><u>8 am-11:30:</u> Session 3 Group B</p> <p><u>12:30-4:30 pm:</u> Session 3, cont'd Group B</p>	<p><u>8 am-12:</u> Session 4 Group B</p> <p><u>1-5 pm:</u> Session 4, cont'd Group B</p>	<p><u>8 am-12:</u> Session 5 Groups A & B</p> <p><u>1-5 pm:</u> Session 5, cont'd Groups A & B</p>	<p><u>8 am-12:</u> Session 6 Groups A & B</p> <p><u>12-1 pm:</u> Closing luncheon</p>

II. BACKGROUND

The Family Planning Management Development (FPMD) project of Management Sciences for Health (MSH), at the request of USAID/Jamaica under the Family Planning Initiatives Project, is providing technical assistance in management information systems (MIS) to the Jamaican National Family Planning Board (NFPB). The first concentrated effort in MIS by FPMD was a needs assessment carried out in January-February of 1993. The needs assessment led to the identification of MIS-related activities to be carried out in two phases. Phase One and Phase Two activities are reviewed below as well as discussed in Section IV, Future Activities.

During 1993 and early 1994, Phase One activities have focused on two specific outputs: the development and implementation of a computerized service statistics system, and the implementation of an MIS Workshop with NFPB upper and middle level managers to sensitize them to the importance of management information systems for effective organizational performance.

Based on specifications developed during the initial needs assessment visit, the first major Phase One activity: design of a computerized system for data entry, processing and maintenance, and reporting of family planning service statistics of the MOH and other important NGOs providing family planning services, took place in Boston from February through May, 1993.

The system was given the name "ServStat" and was developed using the FoxPro database package, with the programming support of FPMD. The initial version of ServStat was installed at the NFPB during FPMD consultant Kip Eckroad's TDY of June 27th-July 8, 1993. During this same TDY Mr. Eckroad reviewed the system being used at the MOH/HIU and together with representatives from the NFPB and the MOH developed the mechanisms for transferring the data (timing, export functions, etc.) from the HIU to the NFPB. The Statistics Unit staff was provided a basic training in the use of the system, data entry, edit and reporting functions as well. Using first quarter data from 1993, made available by the MOH, Mr. Eckroad provided initial training in data manipulation and reporting. Initial, basic documentation of the system was developed and submitted to the NFPB in FPMD's trip report of July, 1993, with the understanding the NFPB Statistics Unit would continue working with the system and provide FPMD feedback on any required adjustments.

The second important activity in Phase One of FPMD's technical assistance to the NFPB, the MIS workshop, took place November 8-19, 1993 in Kingston, Jamaica, the results of which are reviewed in this report.

Phase Two activities will include several additional areas of systems development. FPMD will assist in the development of a computerized accounting and financial management system, once the basic parameters and procedures have been specified in

the work being carried out by Ernst & Young (formerly Pannell Kerr Forster). Work will continue on additions and refinements to the ServStat system and integration of supplementary service information from other sources. Efforts will be made to construct an executive information system (EIS), integrating key variables from different sources and different functional areas into a single, user friendly interface for decision-making by senior NFPB officials. Phase Two will also include ongoing MIS technical assistance and training, with the possibility of a second workshop which focuses on the use of information from the systems which have been implemented.

III. PURPOSE/SCOPE OF WORK

While the central purpose of this trip was to conduct the MIS workshop senior and middle management of the NFPB, FPMD staff also upgraded the ServStat system with a more flexible reporting function, imported the third quarter 1993 data from the MOH/HIU, and provided additional technical assistance to Statistics Unit staff in the use of the system.

A. MIS Workshop

The objective of the first area of activity was to plan, prepare, and implement an MIS workshop for the Jamaica National Planning Board. This activity comprised:

- planning the sessions to be included in the workshop,
- preparing the training materials needed for the workshop,
- making all the logistic arrangements for the workshop,
- training and coordinating guest trainers,
- providing any additional support as required.

B. MIS Technical Assistance

The objective of the second area of activity was to provide ongoing Technical Assistance in the different components of the MIS plan. Specific activities of interest included:

- implementation of the latest version of ServStat and assessment of current use,
- liaison with Ernst & Young on the financial management information system and identification of next steps,
- other information systems such as the one for planning and monitoring of activities.

IV. DESCRIPTION OF ACTIVITIES

A. MIS Workshop

The preliminary preparation of the MIS Workshop for the NFPB took place over a two-day period in July, 1993, when Nancy Murray, Kip Eckroad, and Margaret Watt of MSH, together with Mary Schauer of the Centers for Disease Control and Prevention (CDC), held planning meetings at MSH/Newton. These meetings served to identify the workshop's goals, schedule, session objectives, and activities, as well as the roles and responsibilities of the trainers. The output of the planning meetings was faxed to the NFPB for their comments and approval, which resulted in changes to the schedule and to the suggested groupings of participants. Once the session guides and schedule had been finalized, the trainers continued their work at MSH, planning the sessions in more detail, purchasing the workshop materials, putting together the workshop binders, and making the logistical preparations (room, board, conference rooms, etc.).

The workshop took place from November 8th through 19th, at the Wyndham Hotel in Kingston. The principal trainers, Kip Eckroad and Margaret Watt, arrived in Kingston on November 3rd, 4th and 6th, respectively. Jack Graves (CDC) arrived on the 7th; Mary Schauer and Nancy Murray, on the 14th of November. To encourage participation from everyone in a close working environment, as well as to minimize the disruption of the NFPB's daily activities, the workshop was broken into two phases. All the participants attended the opening and closing sessions together, but the participants were grouped into Group A and Group B (each representing all the key aspects of the NFPB's work) for attendance at the key sessions, which took place during Week 1 and Week 2, as follows:

Week 1

Monday, November 8th:	Session 1, half day, all participants
Tuesday, Nov. 9th:	Session 2, full day, Group A only
Wednesday, Nov. 10th:	Session 3, full day, Group A only
Thursday, Nov. 11th:	Session 4, full day, Group A only

Week 2

Monday, Nov. 15th:	Session 2, full day, Group B only
Tuesday, Nov. 16th:	Session 3, full day, Group B only
Wednesday, Nov. 17th:	Session 4, full day, Group B only
Thursday, Nov. 18th:	Session 5, full day, all participants
Friday, Nov. 19th:	Session 6, half day, all participants

Session 1, "Introduction to the MIS Workshop," served as an introduction to the course, the trainers and participants, and the overall concept and definition of MIS. The session ended with a guided discussion of the NFPB's strategic plan and its implications for MIS development and use.

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Session 2, "Organizational Environment for MIS," looked at the management structures of the NFPB, as these are critical to an understanding of MIS needs and definition of information flow. The participants defined the overall purpose of the NFPB, its major functions, and the functions and activities carried out by the key structures (departments, units) within the institution. An exercise aimed at defining the official and the informal organizational chart generated much discussion and pointed to a need for further clarification of reporting and supervisory lines. In parallel to small-group discussions of the functional areas of the NFPB, there were presentations of various functional components of an MIS (i.e., finance, logistics, service statistics).

Session 3, "Definition of Information Needs," built on the previous sessions to begin defining the overall information needs of the NFPB. The session began with a presentation on targets and indicators, and was followed by a case study demonstrating the type of information collected in a service statistics system. The case study provided participants with a practical experience in identifying the key information needs, critiquing the information reported, identifying improvements to reporting outputs, and using the improved reports to identify management issues. The participants then identified the key indicators for the activities they had previously outlined for the various functional areas of the NFPB.

Session 4, "Data Collection, Processing, and Information Use," began with an exercise on the presentation and analysis of information, using NFPB service statistics and logistics data. NFPB staff analyzed and graphed this data using the FPMD *Family Planning Data Manager* Wallchart, a supplement to *The Family Planning Manager* Issue, "Using Service Data: Tools for Taking Action (Volume I, No. 2). In small groups, the participants then used the indicators defined in Session 3 to draft sample reports that met the management needs of the NFPB, building on their knowledge and their experience from the previous sessions. During Week 2, Group B was given both the list of indicators and the sample reports developed by Group A, in order to benefit from the previous group's work as well as to improve it based on their own ideas. The sample reports developed by Group B, therefore, built on Group A's reports.

Sessions 5 and 6 brought both groups back together to synthesize their outputs; a process which allowed continual improvement and insight from both groups. As a result of these sessions, the participants developed a document that could be used as an outline of an implementation plan, covering general objectives, departmental objectives, activities, and indicators, and to which could be added timeliness, responsibilities, and resources.

The details of the sessions and reading material are available in the workshop binder.

Debriefing meetings were held at USAID/Kingston during the workshop recess, with Betsy Brown, and with key NFPB staff, on Thursday, November 18th.

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B. MIS Technical Assistance

Certain modifications were made to the ServStat software since it was installed in July, 1993. These modifications consisted primarily in changing the report utility from "FoxFire" to "R&R Report Writer" which, it was felt, would provide improved performance and increased user flexibility to design new and modify existing reports. The modifications did not include the additional utility and help functions which are still pending.

At the time of the visit the new computer system designated for service statistics had arrived but was still in the boxes at the NFPB offices. Discussions were held on the location of the system; preparations were made in the statistics office to provide adequate space; and the computer and printer was installed and tested. It was noted that additional software, not included with the computer, would be needed to provide maximum utility to the use of ServStat. FPMD/Boston was able to purchase copies of FoxPro (for DOS and Windows) and R&R Report (for DOS) and have them delivered to Jamaica in time for installation on the final day of the consultancy.

The entire system, including ServStat, was installed and Statistics personnel were given minimal instructions in the modifications. There did not appear to have been much use of ServStat between its installation and the current visit; it is hoped that having the system installed in the Statistics office will encourage more frequent use and experimentation. It must be noted, however, that NFPB Statistics staff had received training in FoxPro since the original ServStat installation. This training will undoubtedly serve them well when they get to the phase of more advanced analysis of ServStat data.

In a separate activity, in response from a request by the NFPB's Director of IEC for assistance in thinking through the activity planning process, an FPMD consultant guided the IEC staff through a structured exercise of "entity-relation" modeling. The exercise helped to specify the types of information which are relevant to the activity planning and monitoring process. Examples were elaborated to provide sufficient detail of a technique which could be used for the planning process, and which could also be used as a basis for an MIS which monitors all activities planned and implemented by NFPB.

As a final follow up activity, several discussions were held with Ernest & Young with respect to the status of the accounting and finance procedures manual for NFPB. Apparently final versions of the manual are close to completion but the final copy was not available by the end of the consultancy.

V. FINDINGS AND RECOMMENDATIONS

A. Organizational Structure

One of the initial workshop exercises was to define the organizational chart of the NFPB as the staff believe it to be structured, and to modify it based on informal lines of communication, supervision, and reporting. This exercise was done with three separate small groups during Weeks 1 and 2. While the results varied from group to group, as could be expected, the majority of the groups drew charts that reflected a good many unofficial reporting lines that are commonly used.

This exercise was not intended as an organizational development effort, but rather as a means of identifying information flow for MIS development. It pointed, however, to a need for clarification of roles and responsibilities, which the NFPB may wish to address at some point in the future.

B. Activity Planning and Monitoring

The MIS workshop, together with the request for assistance by IEC has reinforced the initial Needs Assessment finding that "activity planning and monitoring" make up an important part of what NFPB does and, hence, its information needs. This makes up an important part of the IEC-World Bank project, but it also highlights a need for the overall organization. This increases the priority to identify a system for specifying and monitoring all budgeted activities of the NFPB. As such, FPMD should assist in the development of an MIS which will respond to this area of need. This area will receive increased attention in future visits, along with the Financial MIS module.

C. Workshop Evaluation

Participants were asked to evaluate the workshop by session, and in terms of the overall educational and administrative aspects. Participants were asked to identify themselves in terms of which group they had participated in, as these had different instructors. They were asked to evaluate each component listed in Table A, which had a maximum value of 5. Overall, participants rated the sessions as good, to excellent, and both trainers as knowledgeable and able to present their subject matter clearly. Some participants had already been exposed to MIS theory, while others were hearing about it for the first time. Hopefully, this workshop has served to lessen differences in understanding of key MIS concepts between NFPB staff.

VI. FUTURE ACTIVITIES

A. Next Version and Training - ServStat

There are essentially three areas related to the ServStat module on which FPMD technical assistance must focus. The first, is to finish the software and deliver a system that meets the basic specifications including the utilities, help facilities, and graphics capabilities required by the Board to analyze and present this important data both quarterly and annually. The second, is to provide comprehensive training to NFPB Statistics staff in the operation of ServStat software. Thirdly, all NFPB staff should be trained in the use of the output reports from the ServStat system.

FPMD will continue to refine the Software in Boston, in discussion with the NFPB. FPMD will also design a prototype of a quarterly/annual statistical report using the data from the first three quarters of ServStat to track achievements as against the Strategic Plan developed by the Board, for discussion with NFPB staff.

B. Analysis of Accounting Procedures Manual (Define Next Steps)

A copy of the results of the Ernest & Young procedures manual should be made available to FPMD as soon as possible in order to allow the project to understand current thinking on this important management issue. Upon receipt of this manual FPMD should enter in discussion with Ernest & Young and begin to specify steps to be undertaken for the computerization of this system.

C. Identification of Data to Include in EIS

The identification of parameters for the design and implementation of an Executive Information System (EIS) should continue to be a priority for work of the next couple of visits. It is important to begin to identify the variables which an EIS should monitor, and to define the format in which this data should be presented. FPMD has had several discussions with Future Group about the use of geographical information systems (GIS) and the are other formats which should be considered.

TABLE A. EVALUATION RESULTS OF MIS WORKSHOP FOR THE NFPB

Aspect Evaluated	Group A (n=6)	Group B (n=7)	Not identi ed (n=9)
Educational Aspects: Overall Course	3.7	3.6	3.2
Session I. Introduction to MIS Workshop	2.8	3.6	6.5
Session II. Organizational Environment for MIS	3.6	3.4	3.6
Session IIB. Organizational Environment for MIS (p.m.)	3.4	3.5	3.5
Session 3A. Definition of Information Needs (a.m.)	3.5	3.7	3.7
Session 3B. Definition of Information Needs (p.m.)	3.4	3.5	3.6
Session 4A. Collection, Processing and Info. Use	3.4	3.4	3.4
Session 4B. Collection, Processing, and Info. Use	3.4	4.0	3.5
Session 5. Consolidation of Results	3.3	3.5	3.3
Session 6. Wrap-Up and Conclusions	3.8	3.6	3.5
Administrative Aspects	4.3	3.3	4.0
Trainer: Kip Eckroad	4.0	4.0	4.1
Trainer: Margaret Watt	3.9	4.2	3.8

ANNEX A. Operational Plan

NFPB OBJECTIVES BY DEPARTMENT OR FUNCTIONAL AREA

A. Direction

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
1. To establish FP policy directives and assure their implementation.	System for implementing, recording, monitoring and evaluating policies submitted to the Board.	Recommend policy, submit to Board, implement, follow up, document.		
2. To direct and coordinate the activities of all departments of the NFPB.	Departmental plans based on annual plan, used to measure output against projections. Staff evaluation of coordination activities.	<p>Strategic Plan: Collate activity of each dept. by year.</p> <p>IEC/Training: -Review courses planned, reports to donors, NFPB, etc., staff and human resource development</p> <p>IEC/F.S.: -Review logistics, recruitment, outreach programs, coordination of activities</p> <p>IEC/Communic: -Monitor logistics, programs, target groups, mass media, etc.</p>		<p>↑ ↓</p> <p>From indiv. depts ↓</p> <p>Direct. ↓</p> <p>Indiv. depts.</p>
		<p>Serv. Delivery: Program activities planned, executed, output</p>		
		<p>Warehousing: -Stocks available -Contraceptive logistics mgmt</p>		

B. Projects, Research, and Statistics

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To provide requested and other useful information for the NFPB's programme planning process.</p>	<p>Timely presentation of data/info: quarterly, annual reports.</p>	<p>Provision of quarterly and annual reports on FP activities.</p> <p>Liaise with other agencies in conducting qualitative and quantitative research.</p> <p>Info sharing with agencies in field of pop and FP planning (e.g., STATIN, PIOJ, UNFPA, USAID).</p>		<p>Serv. deliv., IEC</p> <p>MOH, STATIN</p> <p>Public Rel.</p>
<p>2. To ensure the effective implementation, monitoring, and evaluation of special projects.</p>	<p>Planned vs accomplished.</p> <p>Cost-effectiveness for the provision of information.</p>	<p>Site visits.</p> <p>Review financial statements and operational reports.</p> <p>Convene quarterly tripartite meetings.</p>		

NB: Dissemination should be more explicit.

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
		PR&S: -Surveys, prevalence rates, reports & activities, data; USAID, AVSC & JPHP projects		
		Personnel/Admin: -Staff performance, working conditions, benefits, policies, resource dev't		
		Accounts: -Monitoring of cash flow, financial statements, program budgets		
3. To ensure the sustainability of the NFPB.		Cost recovery. MOH support. Follow-up. New initiatives for foreign exchange securement. Follow through on agreements (divestment)	*(see note)	need to strengthen links w/ other depts, PR and Exec.Dirs.
4. To establish and maintain the NFPB as the lead agency for FP in Jamaica.		Advocacy. Sustainability.		

NB: Cost recovery must be defined clearly before identifying indicators.

C. Information, Education, Communication

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
1. To educate males regarding their role in FP decision-making.	No. seminars done. No. persons reached. Increase in demand for male methods (clinic records). Increase in awareness (via CPS, follow-up, outreach). Reports from monitoring seminars (quant. and qual.) from field officers and volunteers.	Logistics planning. Recruitment of participants. Implementation of programme. Evaluation activities. (examples given)		2-way info flow Need serv deliv stats PR&S Public relations, media
2. To motivate women in the high-fertile age group to accept a contraceptive method.				"
3. To provide information through the various media aimed at dispelling FP myths and misconceptions.				"

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
4. To educate a cadre of adolescent peer counsellors to disseminate FP and sexuality information.	<p>Age at first preg.</p> <p>Incidence of preg. in exposed communities and schools (compare to baseline survey) - CPS study.</p> <p>Increase in demand for programmes.</p> <p>No. persons reached.</p> <p>Increase in knowledge (pre-post test, focus group).</p> <p>Increase in demand for educational materials.</p>	<p>Logistics.</p> <p>Recruitment.</p> <p>Implementation.</p> <p>Evaluation.</p> <p>(ex's given)</p>		"
5. To provide information and FP methods to residents of high-fertility areas as a means of changing their attitudes and practices.				"

NB: Issues raised include: IEC's role in encouraging shift from public to private sector; role in selling training activities; role in coordinating with other public-sector campaigns (and supplies)

D. Service Delivery

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To ensure the provision of high-quality public-sector FP services to persons at risk for pregnancy or facilitating pregnancy.</p>	<p>Annual data on target population (from STATIN).</p> <p>Monthly service data by parish and by method (from hospitals, clinics).</p> <p>Monthly data on new acceptors by parish and method (MCSR).</p> <p>CYP and CPS annually.</p>	<p>Evaluation.</p> <p>Referrals.</p> <p>Client education.</p> <p>Liaison w/ MOH.</p> <p>Service delivery.</p> <p>Coordination.</p> <p>Method mix.</p>		<p>PR&S</p> <p>MOH</p>
<p>2. To ensure continuity of use of contraceptive methods in the public sector and to support continuity in the private sector.</p>	<p>No. counselled and no. visits by parish, monthly.</p> <p>Quarterly drop-out rate by parish.</p> <p>CPS (5 yrs).</p>	<p>Client education.</p> <p>Staff training.</p> <p>Supply cycle.</p> <p>Method mix.</p> <p>Referrals.</p>		<p>IEC</p>
<p>3. To support that public-sector clinics are equipped and that public and private clinics have trained staff to encourage the achievement of the desired method mix.</p>	<p>Annual needs assessment reports by VSC and FP coordinators.</p> <p>Monthly usage rates by method and parish.</p>	<p>Staff training.</p> <p>Supplies.</p> <p>Repair & maintenance of VSC equipment.</p> <p>Assist IEC with content for educational materials.</p>		<p>Admin/warehse</p> <p>IEC</p>
<p>4. To ensure the availability of adequate stock levels of desired contraceptives on a timely basis and the effective management of supplies at the clinic level.</p>	<p>Monthly central and peripheral data on stock balance.</p> <p>Usage rates by method and parish.</p> <p>Quarterly statement of expenditure and report on availability of funds.</p>	<p>Training in supply management for staff.</p> <p>Identify products, quantities and times for procurement.</p> <p>Top-up system.</p>		<p>Admin/warehse</p>

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
5. To develop, plan, and manage budget allocations to meet programme outputs effectively.		Liaison with Budget dept. Allocate funds. Monitor budget. Identify innovative approaches to improve cost-effectiveness and cost recovery.		Admin/finance

8E. Administration

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To ensure that personnel are recruited promptly and adequately.</p>	<p>Vacancy rate and average time post is unfilled.</p>	<p>Prompt advertisement of vacant post.</p> <p>Shortlist applicants and arrange interviews.</p> <p>Select and appoint best applicant given experience and qualification.</p> <p>Ensure proper orientation.</p>		
<p>2. To ensure that the environment and conditions under which all staff work are of the best acceptable standard.</p>	<p>Attrition rate (from personnel records and exit interview).</p>			
<p>3. To ensure the continuous availability of goods and services for the smooth running of the organization.</p>	<p>Inventory control.</p> <p>Level of depreciation of assets.</p> <p>Timeliness of response to requests.</p> <p>Downtime.</p>	<p>Purchasing and distribution of equipment, contraceptive supplies, stationery, etc.</p> <p>Maintenance of property, vehicles, equipment.</p>		

F. Finance and Accounts

OBJECTIVES	EVALUATION	ACTIVITIES	INDICATORS	INFO LINKS
<p>1. To produce accurate, timely information on all financial transactions.</p>	<p>Time lag between submission of bills and payment.</p> <p>Accounts payable data.</p> <p>Commitments info by length of time.</p> <p>Regular audit tests/reports.</p>	<p>Prepare payment documents as authorized.</p> <p>Record payment promptly.</p> <p>Keep analysis books (cash book, ledgers).</p> <p>Record documents for payment/ receipt.</p> <p>Complete bank reconciliations within 3 weeks of month's end.</p> <p>Prepare final accounts and required statements by programme areas and line item.</p>		
<p>2. To ensure prompt payment as authorized, in accordance with the approved budget and accepted financial controls.</p>	<p>Bank reconciliation completed by specific date.</p> <p>Ad hoc examination of sample documents to determine compliance.</p> <p>Regular audit tests reports.</p>	<p>Complete and regularly update commitments register.</p> <p>Update accounts payable records.</p> <p>Pay bills as authorized.</p>		
<p>3. To monitor funds flow for budget control.</p>				

ANNEX B. Participant List

GROUP A

Mrs. Beryl Chevannes, Executive Director
Dr. Olivia McDonald, Medical Director
Mrs. Janet Davis, Director, IEC
Mrs. Ellen Radlein, Director, Projects, Research and Statistics
Mr. Barrington Gordon, Director, Finance
Mrs. Beverly Taylor, Assistant Administrator
Mr. Dudley McFarquhar, Assistant Director, IEC (Training)
Mrs. Marion Kenneally, Advocacy Specialist
Mrs. Bethgee Stephenson, Senior Statistical Officer
Mr. Augustus Davidson, Executive Officer (Stores)
Mr. Augustus Moody, Internal Auditor
Mrs. Vivienne Soares, Statistician

GROUP B

Mr. Lennox Deane, Deputy Executive Director
Mrs. Joy Crawford, Public Relations Officer
Mrs. Rhoda Stamp, Assistant Director, IEC (Communication)
Mr. Earl Reddie, Project Officer
Mr. Easton Josephs, Statistician
Mr. Pedro Henry, Senior Accountant
Mrs. Terry Miller, Administrative Officer
Mr. Wayne Gordon, Storekeeper
Mrs. E. McFarquhar, Family Planning Co-ordinator
Mr. Victor Thompson, Project Administrator
Mr. Cedric Lewin, IEC

ANNEX C. Workshop Schedule

SESSION 1 - "INTRODUCTION TO MIS WORKSHOP"

(Half-day, all participants)

Overview and Introduction
MIS Concepts and the Management Cycle
MIS Implications of NFPB Strategic Plan

SESSION 2 - "ORGANIZATIONAL ENVIRONMENT FOR MIS"

(Full day for each group)

"Management Mis-information Systems"
Organizational Objectives, Roles and Responsibilities, Activities and Functions
Components of an MIS (e.g., Logistics, Finance, Service Statistics)
Departmental Objectives, Roles and Responsibilities, Activities and Functions
Outputs: Descriptions of organization, departments, individuals

SESSION 3 - "DEFINITION OF INFORMATION NEEDS"

(Full day for each group)

Targets, Monitoring and Evaluation
Exercise on Defining Information Needs (VIVAS case study)
Definition of Information Needs of NFPB
Identification of Operational Indicators
Outputs: Index of program output; Operational indicators

SESSION 4 - "DATA COLLECTION, PROCESSING, AND USE"

(Full day for each group)

Presenting Information: Charting Exercises
Report Design
Outputs: Sample reports; Information flow

SESSION 5 - "CONSOLIDATION OF RESULTS"

(Full day, all participants)

Presentations of Results and Discussion

SESSION 6 - "WRAP-UP AND CONCLUSIONS"

(Half-day, all participants)

Summary of Workshop
Discussion of Next Steps
Identification of Responsible Persons and Timeline
Workshop Evaluation

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