Integrating Reproductive Health Into NGO Programs

Volume 1: Family Planning

Trainer's Guide

SEATS

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Family Planning
Service Expansion
and
Technical Support

By Joyce V Lyons, Jenny A Huddart
and Donna Bjerregaard

Integrating Reproductive Health into NGO Programs Volume 1 Family Planning Trainer's Guide Printed in the United States

The goal of the Family Planning Service Expansion and Technical Support (SEATS) Project is to expand access to and use of high-quality, sustainable family planning and reproductive health services

John Snow, Inc (JSI), an international public health management consulting firm, heads a group of organizations implementing the SEATS Project These include the American College of Nurse-Midwives (ACNM), AVSC International, Initiatives, Inc , the Program for Appropriate Technology in Health (PATH), World Education, and partner organizations in each country where SEATS is active

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Acknowledgments

The Trainer's Guide is meant to accompany the Handbook, *Integrating Reproductive Health into NGO Programs, Volume 1 Family Planning,* which is part of the broad strategy of the SEATS Project to expand family planning services to meet the needs of women and men who have limited health service options and less access to high quality family planning services This strategy recognizes the strength and diversity of the NGO community and their commitment to community service as the bridge between services and unmet needs We gratefully acknowledge the United States Agency for International Development for their financial support of this project through Contract # CCP-3048-C-00-4004-00

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Introduction

Family planning is key to the social and physical health of communities In developing countries, women face 38 times the risk of dying from the complications of pregnancy, childbearing and unsafe abortions Children born fewer than 17 months apart are twice as likely to die before age five than those separated by two or more years Thus, providing women and men with the tools to make informed choices about the number and spacing of their children promotes both maternal and child health

But family planning reaches beyond the physical health of women and children, it has an impact on the social well being of the entire family Women who are able to plan their pregnancies can make decisions over other aspects of their lives They have the chance to take advantage of educational economic and political opportunities Planned birth spacing can result in more time and resources for raising and nurturing children, sending them to school, and improving the family economy

Unmet need describes more than one-fifth of the developing world's women of reproductive age who do not have access to modern contraceptive methods although they have expressed a desire to limit or space their pregnancies Further evidence of the existence of unmet need is the 52 million women who annually resort to abortion many performed under unsafe or unsanitary conditions [1] In developing countries, over a half million annually die of complications of child bearing and child birth The challenge is to provide preventive reproductive health services and reach these women before a crisis occurs

Role of Non Governmental Organizations (NGOs)

It is in this context that community based organizations can play a significant role Historically non government organizations have established unique relationships in the communities they serve, often able to reach groups that government programs cannot NGOs have shown that they can mobilize community participation and provide high quality services

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Turnbull Wendy P Endangered U S Aid for Family Planning Overseas Issues in Brief New York Alan Guttmacher Institute 1996

The Reproductive Health Integration Initiative recognizes the contribution that established NGOs and PVOs can make toward improving the demand for, access to and quality of family planning services The Integration Initiative seeks to enable NGOs involved in other health and development services to respond to the family planning needs of their communities by helping them integrate FP activities into their current portfolio and strengthen existing efforts

Background

The Handbook, *Integrating Reproductive Health into NGO Programs, Volume 1 Family Planning* was designed to help NGOs integrate family planning services into their ongoing program In six easy to understand steps, the Handbook guides the user through the essential components of program integration The contents are based on the assumption that the participating organizations have experience in program implementation and management It is, therefore, not intended as a comprehensive management guide to carrying out family planning programs The Handbook is the central tool of a well-planned workshop conducted by trained leaders and designed to provide NGOs with the keys to the essential aspects of family planning that ensure successful integration

Volume 1 is the first of three Handbooks created to develop a complete reproductive health focus, Volume 2 & 3 will concentrate on HIV/STDs and Safe Motherhood, however each Handbook is an independent entity An NGO should integrate the component most appropriate for its service delivery and client base Once successful integration of one aspect of RH has been accomplished and the NGO has demonstrated sustainability, commitment and comfort with the program, other components of RH can be introduced

Trainer's Guide

Part One of the guide provides instruction on how to organize the Integration and TOT Workshops Part Two provides guidance for conducting the Integration Workshop Part Three comprises the Training of Trainers Workshop structure and implementation guidelines The Annex contains supplementary material to assist in organizing evaluating or implementing the workshop as well as hard copies of the overheads The Overheads are also located in the disk attached to the back cover

Workshop Objectives

The Integration Workshop is designed to

- Explore strategies for strengthening and expanding family planning as part of an integrated package of services

- Develop a strategy and plan for effective integration of family planning services

The Training of Trainers Workshop is designed to

- Prepare participants for their role as advocates of integration by reviewing and practicing the FP integration steps

- Prepare participants to conduct integration workshops through practice in workshop design and organization, teaching methods and evaluation

Part One:

PRE-WORKSHOP GUIDANCE

Integration Workshop

There are 15 sessions, each representing a separate topic or activity The materials for each session cover

- Session objectives

- Session guides indicating the main topics to be covered suggested time allotments, and a list of materials required for this season

- Trainer's notes indicating main points for summary and emphasis, corresponding sections in the Handbook and OH references (See OH Section and the enclosed diskette)

Workshop Preparation

1 Data Collection NGOs

Collecting contact information about each participant and general information about the NGO makes it easier to

- Pre-screen the organizations for workshop suitability
- Tailor the workshop to meet specific needs of participating organizations
- Produce a participant list
- Assist the trainers to facilitate concept paper development
- Provide follow up to the NGO
- Provide information to potential donors

Information can be collected using the sample Data Collection Sheet (See Annex 1) For accuracy the information should be verified at the Workshop before the final participant and organization list is compiled and distributed

2 Selection of NGOs

The Data Collection Sheet assists in the selection of appropriate NGOs for the Workshop The Workshop can be adapted to meet the needs of the participating organizations, however, it is important that a division is made between health and non-health focused NGOs It is highly recommended that separate workshops are organized for these two sectors so as to avoid the pitfalls of over-simplification and frustration on both sides The workshop should not be viewed as a complete guide for implementing family planning programs, it is geared rather for NGOs who have proven success in their current activities, a strong infrastructure and the potential to commit to new services These criteria help to ensure sustainability of the integration activity NGOs selected to participate should have

- Current programs that provide the NGO with access to women and men of reproductive age
- Demonstrated ability to reach established program objectives
- Experience in implementing a donor-funded project
- Management systems in place to track and report on finances and activities

Once it has been decided what types of NGOs the Workshop will serve, recommendations for appropriate organizations can come from the funding source, donor agencies, and personal contacts Using the Data Collection Sheet, these organizations should be carefully pre-screened to ensure their interest in and ability to effectively integrate a FP program Factors to consider are length of time in business, number and types of employees, and number and types of donors

3 Participant Specifications

It is prudent to include two representatives from each selected NGO to participate One participant should be a senior decision maker/manager the other should be a program supervisor who is conversant with implementation experiences of the NGO Involving both officers in the course improves the chances of a realistic and effective program design emerging and of the proposal gaining the acceptance of the NGO Management and Board For maximum effectiveness, the total number of NGOs should be no higher than 12 the total participants 24

4 Administration Preparation Checklist

PRE-Workshop

Two Months Prior to Workshop

- ❑ Develop a list of prospective NGOs from relevant sources

- ❑ Send a letter of inquiry and Data Collection Sheet to prospective NGOs requesting 2 participants one senior manager and one program supervisor

- ☐ Review Data Collection Sheets and select NGOs based on criteria listed above

- ☐ Find a suitable Workshop location

Six Weeks Prior to Workshop

- ☐ Send an invitation letter to the NGO Director and participants acknowledging their selection in the Integration Workshop provide logistical details regarding the Workshop

- ☐ Find appropriate resource people to match the needs of the participants and the focus of the Workshop

Opening session As designed, guest speakers are used to cover development implications of Reproductive Health, i e, effects of increased population on other sectors If outside speakers are required family welfare, health, and donor agencies dealing with FP/RH and national or international research institutes, e g, Population Council are good resources for potential speakers It is always helpful to have a representative from the funding source as a guest either to present on the topics listed above or to give a short welcome address Letters to prospective speakers should be sent out one month before the Workshop introducing the program and the participants, describing the speaker's topic and asking for cooperation A personal visit to all speakers once the trainer is on-site will help answer any remaining questions and facilitate the speakers' commitment

Depending on the focus of the NGOs involved in the Workshop other topics may be added or substituted for those suggested above Guest presenters from NGOs or sectors more relevant to those of the participants who have integrated RH services can also be considered

Contraceptive Technology Update This is an important session and care should be taken to find someone familiar with the material particularly up to date information Ask for recommendations from research institutes JHPIEGO other technical consultants and organizations Prepare an outline listing the topics you want covered in this session and send it to the selected speaker at least 2 weeks before the session Review contraceptive videos to evaluate the possibility of incorporating them into the session

Panel of Experts The role of the panel is to provide feedback to each NGO on the relevance, feasibility and coherence of their Concept Paper and to make suggestions on what further work needs to be carried out before a detailed program proposal could be developed Four to five professionals from a range of development organizations provide the framework for a well-balanced panel Ensure that the panelists understand they will be representing their organization in a consultative role and not as funding sources Helpful backgrounds for panelists include experience in FP integration NGO activity, donor requirements and proposal review Workshop leaders should begin investigating possible leads at least a month before the actual workshop The easiest way to identify panel members is through personal contacts and networking Letters to international and national donor agencies, family planning associations, and aid agencies explaining the purpose of the panel and asking for recommendations are also helpful It is a good idea to enclose a copy of the workshop schedule, the table of contents from the Handbook, the outline of the concept paper and a tentative schedule for the proposed panel session in a letter to prospective panelists (See Trainer's Guide Annex 6 and Session 6) A follow-up personal visit prior to the Workshop helps to answer any remaining questions and builds the panelists' commitment to the workshop objectives

Four Weeks Prior to Workshop

- ❑ Review meeting room/lodging and dining arrangements for suitability/arrangement specifications/dietary needs/etc
- ❑ Review and fill equipment needs e g overhead projector video slide projector computer printer copier
- ❑ Buy/obtain necessary stationery items white boards markers, flip charts tape writing pads, pens, additional transparencies
- ❑ Ensure someone is hired/available to type and copy the Concept Papers for the Panel of Experts session
- ❑ Design and order Workshop Banner, if required
- ❑ Organize if time permits and interest suggests a field trip to a relevant family planning program
- ❑ Organize a welcome reception, if appropriate

Two Weeks Prior to Workshop

- ❑ Notify participants, send draft agenda and outline for 5 minute presentation by each NGO (See Annex 3)

- ❑ Hire (if desired) local photographer for group picture

- ❑ Prepare display material (indicate those that are for display only)

- ❑ Prepare name tags

- ❑ Prepare a registration packet for each participant to include a welcome letter (See Annex 2) a short biographical sketch about each of the trainers, the finalized schedule of activities, important information about the training site, the Handbook and first reading assignment, the Pre-Workshop questionnaire with instructions for completion and return (See Annex 4a and 4b)

- ❑ Decide on initial seating arrangement and system for subsequent days

Additional Administrative Details for International Programs

Begin Six Weeks Prior to Event

- ❑ Send formal participant/NGO invitation letter stating when, where and by whom the Workshop is run

- ❑ Instruct participants to submit visa applications at least 3 weeks before the travel date

- ❑ Request flight details from each participant

- ❑ Arrange logistical and financial arrangements for airline tickets and expenses (per diem)

- ❑ If necessary notify or request permission from appropriate agency for travel to and from duty station for each participant

- ❑ Create a schedule for airport pickup if applicable

- ❑ Organize housing assignments rooming requests should be complied with if possible

Daily Tasks

- ❑ Review sessions & time allotted
- ❑ Review materials
- ❑ Review equipment, ensure all is in working order and compatible with speakers' materials, videos, etc
- ❑ Ensure correct number of handouts
- ❑ Give homework reading assignment
- ❑ Confirm logistics coffee breaks, lunch, meeting room set-up etc

Post-Workshop

- ❑ Send thank you letters to all participants, guest speakers, panel members, etc
- ❑ Prepare Workshop Report
- ❑ Send Report to all participants with a Revised Participant List
- ❑ Send Report to Executive Director of the participating NGOs and state your availability if desired, to assist in project design, implementation, etc
- ❑ Send follow-up survey six months post-Workshop to gain perspective on workshop effects and need for additional assistance

Design of Integration Workshop

As designed the Integration Workshop is an intense four and half day course to be led by two or more trainers If additional time were available, exercises which can reinforce or add to the material presented are included in the TOT Workshop Outline During the workshop, the participants are guided through the six steps strengthened by presentations by guest speakers and the viewing of reproductive health training videos Specially designed worksheets are used to reinforce and relate the learning to actual situations Sharing of ideas and information among the participants through group work and plenary discussions is encouraged An important component of the workshop introduced the first day and built upon in each successive step is the development of the concept paper Preparing the paper essentially a preliminary project strategy is an exercise designed to help integrate the six steps into an effective program The concept paper is completed by participants after the six steps have been assimilated on Day Four and then presented to a 'panel of experts' for feedback on Day Five

Integration Workshop

Day One	Day Two	Day Three	Day Four	Day Five
Session 1 Welcome Introduction RHII Workshop Overview Introduction Handbook	**Session 6** Introduction to the Concept Paper **Session 7** Selecting a Program Strategy **Session 8** Sustainability	**Session 10** Identifying Staffing Requirements	**Session 12** Managing the Finances for an Integrated Program	**Session 14** Presentation to Panel of Experts **Session 15** Planning the Next Step/ Closure & Evaluation
Session 2 Contraceptive Technology update **Session 3** Case Review Introduction to the Teaching Case **Session 4** Deciding Whether to Integrate Family Planning	**Session 9** Measuring Program Results	**Session 11** Developing A Contraceptive Supply System	**Session 13** Concept Paper Preparation	
Session 5 Family Planning Videos →		← Concept Paper Preparation	Concept Paper Finalization	

Pre-TOT Workshop Preparation

1 Participant Selection

It is important for participants to have had the experience of an Integration Workshop prior to their enrollment in a TOT Workshop Trainees should therefore be pre-selected from among the Integration Workshop participants Care should be taken to include participants who have the potential to replicate the training inside and outside their own organization Explain clearly the time commitment expected of participants for workshop participation, ascertain if this presents any conflict with previously scheduled work The ideal number of participants, in this small group oriented workshop should be approximately half the number attending the Integration Workshop or 10-12 participants

2 NGO Selection

As part of the design of the TOT Workshop an optional mini-NGO Workshop is included to provide practicum experience to newly trained trainers and to help trainers understand the importance of reaching out to potential NGO partners in the community Non-health focused NGOs with an interest in exploring the potential of integrating family planning into their current programs should be approached Potential candidates can be gathered from PVOs USAID, other international donors, National Family Welfare organizations and other NGOs The criteria for selection of these NGOs is identical to that which is listed for Integration Workshop participation (See page 8) The distinction lies more in the approach to the NGOs than in the selection criteria NGOs should be informed that the Workshop is limited in length and scope to cover the exploration phase of determining whether integrating family planning into their current program activities is a feasible option A complete Integration Workshop cannot be covered in the limited time period however, emphasis will be placed on linking participating NGOs to other resources for training, program development, referral and logistical support Alternatively if time permits, a full Integration Workshop can be considered The number of NGOs invited should be based on the number of trainees in the Workshop, a ratio of 1 2 (trainers participants) is most effective

- ❑ Contact NGOs at least one month before the scheduled workshop
- ❑ Invite two representatives per NGO based on the same participant specifications identified for the Integration Workshop
- ❑ Send a data collection sheet for Mini-Workshop (See Annex 1)
- ❑ Follow-up with NGOs giving exact logistical information re time location and financial arrangements

3 Post Workshop

To encourage the development of integration strategies the NGO must be made aware of local resources for help in program design, implementation contraceptive supply and referral Newly trained trainers from the TOT Workshop should be assigned a role in contacting the NGOs to offer assistance

- [ ] Send thank you letters

- [ ] Prepare & send Workshop Report along with Final Participant List

- [ ] Send Report to Executive Director of NGOs, include listing of local resources who can assist in program design, implementation, contraceptive supply and referral

- [ ] Ensure newly trained trainers understand their responsibility to contact NGOs to offer assistance

- [ ] Do follow-up survey six months post-Workshop to gain perspective on workshop effects and need for additional assistance

Design of Training of Trainers (TOT) Workshop

As formulated, this workshop can be a 3 to 6 day session It builds on the material covered in the Integration Workshop and should not be used as a stand alone training activity The exercises developed for TOT are intended to help deepen and apply the understanding of the six steps discussed in the Integration Workshop

Option One Limiting the format to a three-day TOT Workshop that uses 5 exercises surrounding the case study, *Katiwa*, builds on the knowledge and skills gained in the Integration Workshop and prepares participants to advocate for integration within their organizations

TOT Workshop

Day 1	Day 2	Day 3
Session 1 Deciding Whether to Integrate FP Case Study Introduction Katiwa	**Session 3** Exercise 3 Preparing a Strategy Exercise 4 Preparing Objectives & Indicators	**Session 6** Review of Teaching Resources & Presentation Tips Practice Teaching
Session 2 Exercise 1 Mapping Community Resources Exercise 2 Presentation to the Board	**Session 4** Exercise 5 Calculating Contraceptive Supply Requirements **Session 5** Resource Analysis	**Session 7** Evaluation Follow-Up

Option Two Although more labor intensive, this six-day option prepares participants to independently conduct the integration workshop for partner NGOs This workshop gives them an opportunity to practice the art and skills of presentation by including an NGO Mini-Workshop, planned and executed by the trainees, as part of the training Non-health focused NGOs, selected for their interest in and capacity to include family planning into their present portfolio, can be invited to participate in a 2-3 day training session to be planned and implemented by the trainees in the TOT Workshop

TOT & Sample Mini NGO Integration Workshop

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
TOT Workshop **Session 1** Designing an NGO Workshop Part One **Session 2** Deciding Whether to Integrate FP Case Study Katiwa Exercise 1 & 2 Mapping Community Resources & Board Presentation	Exercise 4 Preparing Objectives & Indicators **Session 4** Forcasting Contraceptive Supply Needs Exercise 5 Calculating Contraceptive Supply Requirements **Session 5** Resource Analysis	**Session 7** Pre Workshop Status Review Continue Workshop Preparation (Part Two)	**Mini NGO Workshop** **(sample schedule)** **Session 1** Introduction **Session 2** What is FP? **Session 3** Contraceptive Method Review **Session 4** Review of FP Services	**Session 9** Evaluating Local Support **Session 10** Reviewing Service Delivery Models **Session 11** Elements of Quality Care	**Session 14** Resource Analysis **Session 15** Evaluation & Closing
Session 3 Selecting a Strategy Exercise 3 Preparing a Strategy	**Session 6** Designing a Workshop Part Two	**Session 8** Practice Teaching	**Session 5** Country FP Overview **Session 6** Determining Organization Capacity **Session 7** Case Study Assessing Organization Commitment **Session 8** Assessing Community Needs	**Session 12** Strategy Development **Session 13** Objectives & Indicators	**TOT Workshop** **Session 9** Evaluation

Part Two:

INTEGRATION WORKSHOP

Session 1: Workshop Introduction

Session Objectives

1 To gain a perspective on the development implications of Family Planning

2 To link organizational needs and expectations with the Workshop objectives and structure

Session Guide

Topic	Format	Timing
1 Welcome to Workshop/ Introduction to Leaders/Guests	Plenary Presentation	35 minutes
2 Development Implications of FP	Plenary Presentation	60 minutes
3 Overview of Workshop Objectives and Format	Plenary Presentation	30 minutes
4 Participant Introduction	Plenary Presentation by Participants	100 minutes Total 3 hours 45 minutes

Preparation

- Distribute
  - Name tags
  - Pre-workshop questionnaires (Trainer's Guide Annex 4)
- Arrange seating assignments
- Confirm speakers' topics and logistical arrangements
- OH 1 1

Trainer's Notes

The following is a suggested format for an opening session It is intended to orient participants to the role of family planning in the larger scope of development, to present them with an overview of the entire workshop and give an opportunity for initial introductions The topics and speakers should be selected to meet the needs of the participants and the protocol requirements of the Workshop It is particularly important in this session, where many players will share the floor, to keep a tight schedule to avoid overrun Where possible participants should be called upon to self-monitor the use of the time

1 **Welcome to Workshop**

- Orient participants to the purpose of the Workshop and welcome them to the workshop site
  - The opening may be led by the trainer or, if applicable, a representative from the host agency
  - Leaders/speakers should give name, affiliation and role in workshop
- Ask participants to state their name NGO, country and briefly state their personal and organizational expectations in attending the workshop

2 **Development Implications of Family Planning**

- Introduce Guest Speaker on a pre-determined subject related to development family planning and specific needs of workshop participants Potential topics include
  - The Relationship of FP to Health,
  - Social and Economic Implications of FP for Families and Communities
  - The Importance of FP Integration,
  - International Trends in Family Planning,
  - National Trends in Family Planning

3 Overview of Workshop Objectives and Format

- Review Workshop Objectives OH 1 1

  1 To explore strategies for strengthening and expanding family planning as part of an integrated package of services

  2 To develop a strategy and plan for effective integration of family planning services

- Review Workshop Schedule

  – Briefly describe the Concept Paper Explain the items for the paper will be reviewed several times during the workshop and should be seen as a way to tie all the steps together, building on the material covered each day

  – Describe the Panel of Experts session and its purpose

  – Announce that evening video sessions are scheduled

- Introduce Handbook

  – Point out the case study and explain how it flows through the book and relates to each step The SAAD Case is an example of integration within the program of a non-health NGO

  – Point out the field examples that illustrate the material covered in the step The Experiences From the Field are examples of how health focused NGOs have integrated family planning

  – Mention there will be assigned evening reading in preparation for the next day's activities

  – Draw participants' attention to the Annexes and the Bibliography

  – Review the Worksheets and explain their relationship to the Steps

- Remind participants to hand in their Pre-Workshop Questionnaires

  – Explain there is no evaluation or grading of answers The questionnaires assist in establishing a baseline of participant knowledge aid in tailoring the workshop emphasis to meet participant needs and together with the post workshop questionnaire help to evaluate the effectiveness of the workshop

4 Introduction of Participants

- Allow each participant five minutes to present information about his or her NGO following the presentation format included in Annex 3

- Alternatively an Ice-Breaking Exercise can aid in introducing the participants

  - Example Give participants a list of questions for interviewing a 2nd participant (Names randomly chosen) Questions should include both programmatic and personal information to make it interesting and "break the ice" The interviewer would then relate the information about the interviewee to the rest of the group

Session 2 : Contraceptive Technology Update

Session Objectives

1 To examine contraceptive options their effectiveness safety and appropriate use

2 To explore current contraceptive research and its relevance to program strategy

3 To review counseling procedures as a tool for selection, use, and follow-up

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 Review Contraceptive Methods & Contraindications	Plenary Presentation	45 minutes
4 Review Current Research	Plenary Presentation	45 minutes
5 Present Counseling Procedures	Plenary Presentation	30 minutes
6 Summarize Main points	Plenary Presentation	5 minutes
		Total time 2 hours 10 minutes

Preparation

- Analyze the pre-workshop questionnaire to shape the contraceptive update presentation to meet participants' needs and knowledge level

Materials Required

- OH 2 1-2 9 (Additional OHs on all methods are available from JHU)

Trainer's Notes

This session presents a great deal of new and sometimes challenging material, particularly for non-health NGO participants, ensure enough time is available Utilizing an outside resource for session two is most effective, criteria to consider is up-to-date knowledge about research on contraceptives, their implications and specific issues surrounding usage in the developing countries To enable him/her to effectively structure the presentation, collect and pass on the pre-workshop questionnaire as soon as possible to the speaker Specific requests for information to be covered, guidance as to the level of participant knowledge, and contraceptive implications for potential service delivery options by the participants should be clearly spelled out Ask the speaker to bring contraceptive samples or supply them yourself Review videos and use those that will enhance understanding of contraceptive usage and counseling Leave the participants with handouts that summarize the material presented and provide sources of information for additional publications Prior to session, give OHs to the speaker and ask him/her to make a selection of overheads to support the presentation

OH 2 1 — 1 **Review Session Objectives**

OH 2 2-2 3 — 2 **Review Contraceptive Methods**

- Identify types of contraceptives for males and females Use display materials for clarity (Review Pre-Workshop questionnaire and data collection form to gear the information to the correct level of the participants)
- Discuss appropriate use of method contraindications, and effectiveness
  - Emphasize importance of personal history, family situation and environment and preferences in making contraceptive choices
- Encourage questions and exchange of experience

3 **Review Current Research**

- Present national trends, costs, and effectiveness studies
- Discuss importance of research for program strategies and how to keep abreast of new developments

4 Present counseling procedures OH 2 4-2 9

- Discuss methods and importance of counseling for initial, method specific and follow up

5 Review objectives and summarize main points OH 2 1

Reference Materials for Contraceptive Technology Update

1 Blumenthal, P D , McIntosh, N *Pocket Guide for Family Planning Service Providers*, JHPIEGO, 1995,

2 Hatcher, et al *Contraceptive Technology* (Seventeenth Edition) Irvington Publishers, Inc , 1998 JHPIEGO,

3 OH JHU/PCS 1995

Session 3 : Introduction to SAAD Case

Session Objectives

1 To use the SAAD Case Study as an interactive learning tool for integration strategy development

2 To introduce the relationship between the case study and the six steps

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Discussion	5 minutes
2 Introduction to SAAD	Plenary Discussion	30 minutes
		Total 35 minutes

Materials Required

- Handbook Page 11
- Flip Chart/White Board
- OH 3 1-3 2

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Trainers' Notes

This session is designed to establish the SAAD Case Study as the informative but enjoyable thread that unites the Handbook by relating the six key concepts to a 'real life' situation To build interest in SAAD and its helpful exercises, be especially enthusiastic in introducing this initial SAAD session Allow participants enough time for a routine of case reading and analytical discussion to develop

OH 3 1 **1 Review Session objectives**

2 Introduction to SAAD

- Use this session to introduce participants to the NGO, SAAD, described in the Case and to describe how the Case will be used for learning
  - Explain that the Case has 'chapters' which correspond to each of the Steps in the Handbook The Case provides an example of how one NGO dealt with each Step
  - State that they will benefit more from the Case if they read the appropriate sections of the Case in advance Say that you will remind them each evening of the Case sections they should read in preparation for the next day

OH 3 2

- Point out that the case questions are inserted in the box on each chapter of the SAAD case and will be projected on the overhead screen Ask participants to read the first chapter of the Case (page 11 of the Handbook) and consider their answers to the questions
  - When they have read this Chapter, lead a discussion of the case asking them to respond to each of the questions List the key responses on a flip chart or white board as the discussion proceeds Guide the discussion to ensure that the key points, which are included on the opposite page, are covered

Question 1 What do we know about this NGO and its programs?	
Information to be covered during discussion	
Area of expertise	▪ Small scale agricultural development
Programs	▪ Dairy farming scheme in one district covering 120 women in 35 villages
Staff	▪ Has a management Board a management team at head office, and agricultural development officers at district level providing training and technical support

Question 2 How successful is the dairy farming program?	
Information to be covered during discussion	
Scale	▪ 120 women across 35 villages
Duration	▪ More than 4 years
Loan repayments	▪ Only 12 women have defaulted on their loans
Commitment of dairy farmers	▪ Is high The women participating in the program are concerned about the success of their dairy farming efforts

Question 3 What problems is the program facing?

Information to be covered during discussion

- Women find it difficult to continue work when pregnant
- Cost of new child causes financial problems
- Access to health care is difficult
- Need to seek health care (such as immunizations) results in the mother having to take a day off work

Question 4 What can we say about SAAD's approach?	
Information to be covered during discussion	
Collaborative style	▪ SAAD sees the dairy farmers as important partners in their program (The dairy farmers were asked their views on how to improve the program) ▪ SAAD staff listened to the dairy farmers' concerns and made sure that these were reported back to their director

Session 4 : Deciding Whether to Integrate Family Planning

Session Objectives

1 To examine the opportunities and constraints your organization may encounter in the process of integrating family planning

2 To review information about your community that will help you identify members' needs and demands for family planning services

3 To practice mapping existing resources and facilities as an aid to decision-making

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 minutes
2 Defining Family Planning	Plenary Discussion	10 minutes
3 Assessing organizational commitment to family planning	Plenary Introduction Activity in NGO Pairs (Worksheet 1a)	10 minutes 30 minutes
4 Defining community needs and evaluating local support for family planning	Plenary Discussion	20 minutes
5 Identifying existing services and resources	Plenary Introduction Activity in NGO Pairs (Worksheet 1b)	30 minutes
6 SAAD Case Review	Plenary Discussion Exercise	20 minutes
7 Review Session	Plenary Presentation	5 minutes
		Total Time 2 hours 10 minutes

Materials Required

- Worksheet 1a and 1b
- Handbook Step 1 Pages 5-18
- OH 4 1-4 6
- Handbook pg 18 (Case Study)
- Handbook Annex 1 Using DHS Data To Define Program Objectives

Trainers' Notes

This session reviews the internal and external analysis that needs to be undertaken before a decision to integrate family planning can be made It looks at the justification for integration the organizational and community strengths and weaknesses and the support network needed to help establish and sustain an integration component The trainer should explore how SAAD gathered the necessary information to make their decision

1 Overview

OH 4 1

- Review session objectives

OH 4 2

2 Defining Family Planning

Note The trainer should use his/her judgement as to the necessity of reviewing this point Participants may be quite knowledgeable in this area or the topic may have already been covered in previous sessions, making point 2 irrelevant

- Ask participants for suggestions re definition of family planning Write components on board until concept is defined
  - Definition should include voluntary, couple based, decision making and access

OH 4 3

- Ask for justifications for integrating FP into other programs
  - List points on board Look for mortality reduction, access to clients improve opportunities to improve existing program by reducing family and child-birth related obstacles, increase general health of community Have participants explain how these factors relate to family planning

OH 4 4-4 5

3 Assessing organizational commitment to family planning

- Stress first step in adding new services is to be certain of organization's desire and capability Review (amplify) issues related to organizational commitment Using the questions listed on the OH ask what effect integrating FP would have on the following issues
  - Organizational mission and goals

Consider complementarity between existing program scope and proposed introduction of FP services and effect on client health

- Organizational image

  Consider how image will affect client willingness to accept FP services

- Political influences

  Consider national and community priorities

- Financial implications

  Consider funding possibilities

- Introduce Worksheet 1a Direct participants to break into NGO pairs to complete the Worksheet Explain the purpose of the exercise is to help the NGO analyze the impact integrating FP would have on its organization After completion of this activity, the NGO pairs may be asked whether they wish to share any of their conclusions with the group, this is not mandatory Suggest a more thorough review can take place at their agency

Worksheet 1a Assessing Organizational Commitment

Illustrative Example

Organizational Issues	Questions to Ask	Views
Organizational Mission & Goals	Would FP conform with your NGO's existing mission?	Yes objective is to improve health welfare and economic status of village women
	Would FP help your NGO to achieve its missions & goals	Indeed as fewer and better spaced children will allow time and energy to be put into the income generating power of women

4 **Defining Community Needs and Evaluating Local Support for Family Planning**

- Point out need to assess community needs as well as organization support

- Confirm that participants are familiar with the term "unmet need for family planning" and are able to give the correct definition

- Ask participants what information would help them determine if there is an unmet need for family planning in their communities (See pages 12 and 13 of the Handbook) Ask them how they might gather this information

- Ask how they would determine whether local support is available for family planning initiatives

5 **Identifying Existing Services and Resources**

- Review why it is important to identify what family planning services already exist Explain that to establish what, where and when services are missing and where opportunities exist to form service networks, it is important to take stock of what services exist Elaborate by using the questions on page 16 and the example on page 17 in the Handbook to describe the type of information that should be collected

- Introduce Worksheet 1B and explain its relationship to the Concept Paper Have each NGO pair work separately to complete this activity Participants may wish to review ways in which they can obtain information to provide a more complete picture of their community

OH 4 6 6 **SAAD Case Review**

- Direct participants to read the case study and case questions on page 18 of the Handbook
  - Lead a discussion of the participants' responses to the case questions Key points that should come out of the discussion are given below

Question 1 What information might the SAAD Director have been given that would indicate a need for Family Planning services?
Information to be covered during discussion a) Data from a recent Demographic and Health Survey or other survey, such as – Total fertility rate – Mean number of children surviving – Percentage of women currently using a modern method of contraception (CPR) – Percentage of women who do not wish to become pregnant who are not presently using any method of contraception (unmet need for family planning)

Question 1 Continued
– Infant mortality rate, number of children under one year of age who die per 1,000 live births (IMR) – Maternal mortality ratio, maternal deaths per 100,000 births (MMR), or maternal mortality rate, number of maternal deaths per 100,000 women of reproductive age per year The ratio is used more commonly than the rate b) Information from their own experience with their community such as – Community statements about their needs and problems – Perceptions of high numbers of children per family – Incidence of teenage pregnancy and school drop outs for reasons of pregnancy – High incidence of abortions (and complications of abortions) – Reported problems with STDs – Poor access to health services, particularly for women – High incidence of reported maternal deaths during pregnancy and labor

Question 2 What indications of need for health and family planning services did the dairy farmers express?
Information to be covered during discussion ▪ Access is currently restricted due to distance to nearest government health facility and difficulties with transportation ▪ The villagers do visit private health practitioners when they are sick but they cannot obtain either immunizations or family planning services from these sources and the private practitioners have high charges

Question 3 What can we say now about SAAD's approach to the concerns of the dairy farmers?
Information to be covered during discussion ▪ SAAD staff are still following up the dairy farmer's concerns and requests ▪ Following the SAAD Director's meeting with the IPPF affiliate SAAD went back to the dairy farmers to discuss their findings and to agree on follow-up actions to be taken ▪ SAAD asks the dairy farmers to participate in a program - not just to be passive recipients of some further assistance ▪ SAAD has recognized IPPF's expertise and is continuing to involve them in program decisions and discussions

OH 4 1 **7 Review objectives and summarize main points**

Session 5: Introduction to Evening Videos

Session Objectives

1 To acquire additional information about contraceptive method options including how they protect against pregnancy, their effectiveness, guidelines for use, contraindications and misconceptions

2 To see examples of successful program strategies such as community based care and clinic services implemented by other organizations

3 To observe the steps of counseling clients for FP

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation & Discussion	10 minutes
2 Video Presentation	Plenary Presentation	30 minutes (variable)
3 Feedback	Plenary Discussion	20 minutes
		Total Time 1 hour

Preparation

- Preview Videos (See Annex for Annotated Listing of Videos)
- Check equipment for compatibility with video

Materials Required

- Handbook Annex 2 Contraceptive Method Chart
- Optional OH 5 1
- Annotated Bibliography

Trainer's Notes

Videos may be shown in auxiliary sessions or be incorporated into the body of the Workshop, supplementing the discussion in relevant sessions Reviewing the contents of the video and checking the equipment beforehand will improve the effectiveness of the session Post-viewing discussion can be led by a trainer, outside facilitator or participant

1 **Session Overview**

OH 5 1

- Review Objectives
- Introduce video choices providing a brief description of each
- Decide on order of presentation for each evening
  - Post list for following evenings on a poster, white board or overhead
  - Develop a facilitation system for discussion either choosing a leader from participants or trainers
- Continue evening sessions as long as interest prevails

2 **Show Video**

- Remember to check the condition of equipment and its compatibility with videos on a daily basis

3 **Feedback**

- Lead a discussion on the video and its relevance to program integration

Session 6 : Introduction to the Concept Paper

Session Objectives

1 To understand how the Concept Paper guides the organization of the integration strategy

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 Introduction to the Concept Paper	Plenary Presentation and Discussion	30 minutes
		Total 35 minutes

Materials Required

- Concept Paper Outline Trainer's Guide Pg 40
- OH 6 1-6 4
- Handbook Annex 4 Preparing a Project Proposal

Trainer's Notes

The concept paper allows the participants to transform the theoretical knowledge gained in the Workshop into a practical form It is important to introduce the outline and expectations for the paper early in the Workshop so focus is geared toward the final task Explain that the worksheets, handouts and the Handbook act as supportive material in the preparation of the paper and that it is drafted by the NGO representative and his/her partner Time should be set aside on the 2nd and 3rd evenings and 4th day to begin the thinking and writing process, this will also give participants a chance to ask relevant questions The 'Panel of Experts' session should be presented as an exciting opportunity to receive feedback on the proposed plans

OH 6 1

1 **Session Objective**

2 **Introduction to Concept Papers**

- Relate the purpose of the Concept Papers
  - To organize and present participant's ideas about how their NGO might integrate Family Planning into its existing programs
  - To summarize the work accomplished by participants during the workshop
  - To organize and structure ideas for integration into a presentation for NGO Boards/staff

OH 6 2-6 4

- Describe the format of Concept Paper
  - Review each component with participants Answer questions to clarify the purpose of each section and the production expectations
- Discuss the process of developing the Concept Paper
  - Each Integration "Step" is accompanied by worksheets that will help participants to formulate the elements of their Concept Paper

- Participants are encouraged to start on the development of the Concept Paper after Step 2 is completed and to add to the Paper as each step is completed They may also wish to refer to Handbook Annex 4 for additional guidance

- Participants will have the afternoon of the 4th day to prepare/finalize their Concept Papers - however they can start at any point during the week

- Trainers are available to help, at any reasonable hour with the development of the Concept Papers

- Remind participants that the Concept Papers should not be more than three pages in length

  - All Concept Papers must be submitted to the training team the last evening to ensure their ability to be photocopied and distributed

- Discuss the presentation of Concept Papers

  - Panel of Experts

    Explain that participants will be given the opportunity to present their concept papers to a panel of experts on the final morning Stress that the panel members are development experts who have agreed to 'volunteer' their time to give feedback, based on their experience and skill and not in their capacity as representatives of funding sources

  - Panel of Resource People (Alternative)

    If you are unable to identify outside experts to conduct the panel the trainers should be prepared to review and critique the Concept Papers

Concept Paper Outline

I Descriptive Title Include agency name and location

II Background

a) Population Coverage

b) Characteristics of people currently served by the organization

c) Current program activities

d) Problem Statement

e) Justification for Integration

III Strategy

a) State objective, list indicators and performance targets

b) Describe the approach, include the target group, the service delivery strategy, and the referral network Include who will carry out the strategy and how they will be supervised

c) Describe what organizations you will work with to implement your strategy

d) Describe how this strategy will fit with the organization's current set of programs Consider the impact of adding this strategy onto existing systems and procedures for planning, monitoring, staffing, finance and logistics

e) State how the program is to be monitored

IV Sustainability

a) Describe the organization's financial strategy to support FP integration, include fund-raising, grants, shared costs

b) Describe how you will continue activities once funding is ended

Session 7: Selecting a Program Strategy

Session Objectives

1 To review the elements of quality of care for family planning programs

2 To examine family planning service options

3 To review and apply the principles of referral system design

4 To select a service delivery strategy that responds to community needs and meets accepted quality standards

Session Guide

Topic	Format	Timing
1 Session Overview	Presentation	5 minutes
2 SAAD Case Review	Case Reading and Group Discussion	30 minutes
3 Family Planning Services and Service Delivery Strategies	Presentation/Discussion	25 minutes
4 Defining Quality Care for FP Services	Large Group Exercise/ Discussion	30 minutes
5 Referral System Design	Exercise Worksheet 2a in plenary session	30 minutes
6 Matching Community Needs and Service Strategies	Plenary Presentation Exercise Worksheet 2b	30 minutes
7 Summarize Main Points	Plenary	10 minutes
		Total Time 2 hours 40 minutes

Materials Required

- Integration Handbook Step 2 Pages 19-38
- Worksheet 2a & 2b
- OH 7 1-7 13

Trainer's Notes

This session reviews the different family planning services and service delivery strategies, the elements that make up quality programs and the importance of designing referral systems Participants should see these 3 components as an integrated whole service options should be decided on the basis of organizational capacity and target population need, incorporate elements which ensure high quality programs, and include a well-defined referral network The trainer should emphasize how completion of this step is critical to the concept paper preparation

1 Overview

OH 7 1

- Review session objectives and session plan

2 SAAD Case Review

OH 7 2

- Direct participants to read the Case Study and review case questions on pg 32-33 of the Handbook This exercise sets the stage for strategy development by assisting participants to consider how the SAAD strategy was developed

- Lead a discussion of participants' responses to case questions Key points to cover for each question are given below Write participant comments on the Board and summarize after all questions are discussed

Question 1· Why were farmers selected to be CBDs?
Information to be covered during discussion
▪ Farmers are known to the community and had high status ▪ Financial incentive possible ▪ Farmers are natural link to the community ▪ Farmers actually live in community, have regular contact and trust of community ▪ SAAD extension workers were too few and had infrequent contact with farmers

Question 2: What support did SAAD receive from the IPPF?

Information to be covered during discussion

- IPPF staff designed the strategy and shared information about Family Planning with SAAD staff
- Trained farmers as CBDs
- IPPF staff supervised CBD/farmers at the mobile clinic
- Provided supplies of contraceptives
- IPPF Mobile clinic served as the first referral point for farmers
- Clinical staff provide reproductive health services

Question 3: What FP services did the SAAD project make available to the community?

Information to be covered during discussion

- Pills and condoms distributed at community level
- Referral for clinical services for IUDs, injectables
- Diagnosis and treatment of sexually transmitted infections
- Ante-natal care/immunizations
- Family planning method information and counseling

Question 4: What was the role of the SAAD Board in facilitating the project?

Information to be covered during discussion

- Approved the expenditure of seed money to start the program
- Made provision for staff to address issues not directly related to running the cooperative
- Recognized the business benefits of a healthy work force and was willing to invest in promoting health
- Strengthened the image of IPPF in the community

3 Family Planning Services and Service Delivery Strategies

OH 7 3-7 5
- Review the approaches to FP Services and the optimal conditions for providing these services IEC, Counseling, and method services

OH 7 6-7 9
- Discuss specific strategies for Clinic based services i e static clinic and mobile clinic, and CBD i e Community Based Agent, Community Based Supply Depot and Community Based Retail Distribution (Social Marketing)

- Ask participants to share their experiences in delivering other services to draw out the need for skilled manpower, organizational commitment, source of supplies, distribution networks and monitoring system when delivering any community service

- Use chart on page 27 of the Handbook to review requirements for provision of FP services through CBDs and clinics Discuss how the final choice of strategy relates to NGO's ability/capability to meet these standards

4 Defining Quality Care

The table on page 21 of the Handbook describes elements of high quality FP services In order to bring this out use the following exercise

- Ask participants to picture their favorite shop, one they often visit

  - Have them respond as to what makes the shop their favorite Write their responses on board They will describe elements of high quality care, e g , accessibility, constant supply, fresh items quick service, good prices, full range of services, friendly informative, competent and competitive, etc

  - Ask participants to characterize family planning services they have experienced or observed

  - Relate the participants' concern for high quality services to their plans for providing family planning services

OH 7 10

  - Display the OH listing the elements of quality FP services to summarize the session

  - Include a specific discussion of "Informed Choice" as a critically important element of family planning

5 Referral System Design

- Begin the discussion of referral systems by obtaining the participants' views on the question--Why is it important to have an effective referral system?

- Discuss different approaches to building referral networks

  - Referral to IPPF Government services, other private agencies

  - Reference the earlier mapping exercise which included identification of service delivery sites,

  - Direct participants to the Experience from the Field on page 31 of the Handbook which describes a referral network in Nigeria

- Review the steps in establishing an effective referral system **OH 7 11-7 13**

  1 Identification of Referral Sites
  2 Formalize Referral Relationships
  3 Train Staff
  4 Develop an Information System
  5 Monitor and Analyze Referral Information

- Direct participants to the Case Study Session on page 34 of the Handbook describing the SAAD referral network After studying the chart and reviewing the referral patterns depicted by the lines and arrows ask the following questions

  1 Are the referral sites defined for all required services?
  2 Will the referral patterns ensure full service for clients?
  3 Have the details been documented and disseminated to all staff?
  4 Have referral staff been oriented to the program?
  5 Have CBDs been trained in referral network e g when to refer?
  6 Has a record system been designed for support and monitoring of referral system?

- Ask the participants to suggest how SAAD could strengthen the referral network

- Direct the participants to Worksheet 2a Designing the Referral System Ask them to complete, in plenary session, this worksheet for their NGO's proposed FP strategy

Worksheet 2a Designing the Referral System

Illustrative Example

	Method	Referral Site
1 Have you defined the referral sites (at least one for each method offered by your program)?	Condoms	CBD
	Surgical	IPPF Clinic
	Injectables	Mobile Clinic
	STD Control	Mobile Clinic
2 Have you documented and disseminated details of the referral network to all program staff?	Location of site	✔
	Transportation options to site	✔
	Hours of service	✔
	Services available	✔
	Cost of services	✔

6 Selecting a Service Strategy

- Point out the 'Experience from the Field' on page 33 in the Handbook describing a strategy for providing services in Uganda Ask participants to assess the Uganda program strategy and referral arrangements

- Use the table on page 38 in the Handbook to guide a discussion on selecting a strategy

- Prepare participants to complete Worksheet 2b Parts I & II To complete Part I participants should consider each Service Activity Option for their NGO and complete the column "NGO Focus" with details of the proposed activities if that service is one which the participants feel the NGO can offer

- To complete Part II, participants should consider which service delivery model is most appropriate for their organization and complete the column "Describe NGO Capability" with relevant details about their proposed approach

- The ensuing discussion will allow the participants to learn from the experiences of others and think more carefully about their own strategy

- Alternately you can have them complete worksheet 2b using the SAAD case information

Worksheet 2b Framework for Strategy Selection

Illustrative Example

Part I		
Program Element	**Service Activity Options**	**NGO Focus**
Reproductive Health	IEC	Prepare wildlife protection officers employed by the NGO to share national family planning messages in the communities they serve
	Counseling for FP	
	Service Delivery	Add pills and condoms to the supplies distributed by officers

Part II Selecting a Service Strategy		
Service Delivery Model	**Service Standards**	**Describe NGO Capability**
Clinic-Based Services	Manageable distance from community	
	Convenient hours of operation	
Community-Based Services	Potential Client population Available	Wildlife protection officers travel throughout the villages bordering on national reserves approximately 100 000 people
	Extension workers available	Each of 30 officers covers an area where approximately 3500 people live

7 Summarize Main Points

OH 7 1

- Ask the participants to review the session objectives and summarize the main points

Session 8: Sustainability

Session Objectives

1 To define what is meant by program sustainability

2 To explore the factors that contribute to the sustainability of an integrated family planning program

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Discussion	5 minutes
2 What is Sustainability?	Plenary Presentation	10 minutes
3 Review of Factors that Promote Program (and Organizational) Sustainability	Plenary Presentation & Discussion	15 minutes
4 Review of Factors Leading to Financial Sustainability	Plenary Presentation & Discussion	15 minutes
5 Session overview	Plenary	5 minutes
		Total time 50 minutes

Materials Required

- Handbook Step 2 Page 35 & 36
- OH 8 1-8 4
- Handbook Annex 3 Basic Principals of Fund-Raising

Trainers' Notes

How can an NGO design its program to adapt effectively to the ever-changing demands of its environment? This question leads the participants into a review of how program and financial factors can contribute towards building a sustainable program

1 **Introduction to Session**

OH 8 1

- Present session objectives

2 **What is Sustainability?**

- Ask participants what they understand by 'sustainability' Write key words on a board as they are mentioned (refer to the sustainability definition on OH 8 2 for guidance)

OH 8 2

- Close session by sharing with them the definition of sustainability as given in the OH

3 **Review of factors that promote program (and organizational) sustainability**

OH 8 3

- Lead participants through the factors given on the OH using the following notes to assist you on each factor

  - Ask participants for examples of ways in which they incorporated the factors into their present program

Institutional Factors

- **Strategic Planning** Encourages an organization to pay attention to its environment and to consider how its programs and activities may be affected by (or can be made to respond positively to) this environment

- **Program Monitoring & Evaluation** Processes by which information about how a program is performing is regularly reviewed by managers, decisions made to promote the achievement of the program objectives, and changes in program design made to enhance its progress

- **Marketing** The steps that an organization takes to create a positive image for its program/s and to create demand for its products Public recognition helps governments and tenders to support the program Public demand also promotes further support and reduces the unit costs of service provision

- Supply Management The availability of the required supplies at the places where they are needed is key to both the quality of service provision and, through this, to the effectiveness of marketing efforts

- Human Resource Planning & Management Having sufficient staff, with the correct knowledge, skills and attitudes, to deliver the program's services is also key to service quality and to the effectiveness of marketing efforts A sustainable program also anticipates future staffing needs as part of its strategic planning process and takes the necessary steps to meet these needs

4 **Financial Sustainability** OH 8 4

- Lead a discussion of the factors affecting financial sustainability

- Ask participants for program examples of the following factors

  - **User Fees** Client contributions towards the cost of services is the most effective means over the long-term of achieving financial sustainability But these user fees need to be carefully established, introduced, and monitored to see their effect on client usage (For additional information, refer to Designing a Family Planning System, A Handbook for Program Managers, L Day SEATS/JSI Washington DC 1993)

  - **Subsidies** Where a group of clients is unable to contribute towards the cost of services, there may be opportunities to introduce sliding scale fees or for a program to be subsidized by income derived from another of the organization's programs (For example rental of clinic facilities for use by private practitioners Rental income could then be used to subsidize the provision of family planning services) This has the advantage of reducing the need for external assistance

  - **Decreasing the Unit Cost of Services** By increasing the volume of clients served a program can reduce the unit cost of the services provided i e the staff costs and other fixed costs of the program can be spread over a larger number of clients This makes the program more attractive to potential funding sources and reduces the amount that may need to be charged to individual users/clients

  - **Increasing Cost-Efficiency** This means improving the use of available funds such that more services can be obtained for the same cost Obviously this reduces the unit cost of services and therefore makes available funds go further

- **Fund-Raising** Fund-raising covers many different approaches to procuring donations of money, services and goods to support a program

- *Guidance on fund-raising is given in Annex 3 of the Handbook and participants should be directed to review this material on their own*

5 **Session review**

OH 8 2

- Return to OH 8 2 giving the definition of sustainability Briefly remind participants of the factors that promote sustainability Ask if there are any further questions

Session 9: Measuring Program Results

Session Objectives

1 To examine the importance of objectives, indicators and targets in structuring the program
2 To review how data collection contributes to management and service delivery decisions
3 To examine the use of a monitoring plan as a program management tool
4 To clarify the roles of monitoring and evaluation in program management
5 To explore ways that NGOs can ensure successful integration

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 Case Review Planning for Results	Individual Work Plenary Discussion	30 minutes
3 Objectives Indicators & Targets	Presentation Review/discuss Handbook Annex 5 & 6 Optional Exercise Worksheet 3A	15 minutes 15 minutes 30 minutes (OP)
4 Record Keeping	Review Handbook Annex 7 Group Exercise Plenary Discussion	45 minutes
5 Monitoring and Evaluation	Presentation Case Review Discussion Optional Exercise Worksheet 3b	25 minutes 20 minutes 30 minutes (OP)
6 Managing Integration	Individual/NGO Exercise Worksheet 3c	30 minutes
7 Summarize Main Points	Plenary Presentation	5 minutes
		Total Time 3 hours 10 minutes Optional exercises additional 1 hour

Materials Required

- Worksheets 3a 3b 3c
- Handbook Step 3 Pages 39-51
- OH 9 1-9 22
- Handbook Annex 5 Illustrative Indicators
- Handbook Annex 6 Conversion Factors for Calculating CYP
- Handbook Annex 7 Routine Records for Family Planning Services

Trainer's Notes

Much of the material in this session is not unique to family planning The session assists participants to understand and apply basic principles of monitoring and evaluation to family planning programs Careful review of Handbook Annexes 5 and 6 will assist trainers in preparing for the session The discussion on record keeping should be used as an opportunity for sharing systems presently used by the participants Familiarize yourself with the sample records for CBD and clinic based programs contained in Handbook Annex 7 before leading this discussion

OH 9 1

1 **Overview**

- Present session objectives, describe the activities and timing

2 **SAAD Case Review**

- Direct participants to the case study and case review questions on page 44 of the Handbook

OH 9 2

- Display the questions on OH before the participants start reading Ask them to consider these questions while they read the case After 10 minutes lead a discussion of the case Bring out the following information during discussions

Question 1 Does the SAAD objective meet the criteria for a good program objective?
Information to be covered during discussion The SAAD objective has the following characteristics ▪ States the task to be accomplished ▪ Specifies the scope of the task (who will be served and what will be accomplished) ▪ Provides a timeframe for completion ▪ Specifies how results will be measured Note An objective can be written in two ways as a specific comprehensive statement which includes all of the above elements or as two statements When two statements are used, the first is a general description of the task including a time limit for completing the task, the second statement addresses how achievement will be measured In the SAAD case, the achievement is quantified in a separate statement which includes indicators (measures) and targets (quantity) for documenting results

Question 2 What are the indicators that SAAD has chosen? Can you suggest others?

Information to be covered during discussion

- New acceptors, i e people who are first time users of modern contraceptive methods
- Trained CBDs active in their community

Other possible indicators include

- Continuing acceptors
- Drop out rate
- Acceptors new to the facility (people who have used contraceptives in the past but who will now receive their supply from this source)

Question 3 What do you think IPPF means by performance targets?

Information to be covered during discussion

- Number of women expected to receive services from individual CBDs This number is determined by the CBDs after a community household survey is completed

- Additional Question What will SAAD/IPPF accomplish by requesting that the CBDs establish their own performance targets?

Discussion

- Differences in population size and density among the communities served by the CBDs make it inappropriate to impose achievement goals by dividing the total population among the CBDs

- Before a CBD can set a realistic performance target she must know the number of potential clients in her catchment area and become familiar with their needs and interests This is an essential step in providing good community based service

- Performance targets determined by CBDs are likely to be realistic

- A CBD who sets his/her own level of performance has greater commitment to achieving the performance target

- Use the discussion to reinforce elements of the Handbook related to objectives, performance indicators, difference between indicators and targets

Question 4 What else can the record be used for, besides helping the CBD's to plan their work?
Information to be covered during discussion • To provide data to help in developing a new strategy or improving an existing strategy • To help the supervisor identify problems • To provide information for reports to the Board or other supervisory bodies

OH 9 4

3 Setting objectives, selecting indicators and establishing targets for a FP program

Guided Discussion

- Review the definition of objectives and elicit examples of objectives from the group's experience

OH 9 5-9 7

- Review the definition for performance indicators and discuss guidance for selecting indicators

- Make the connection between indicators and data collection efforts Discuss the importance of keeping indicators simple, that is selecting indicators which can be measured using routine data collection records whenever possible Spend some time discussing the level of effort required to collect data for surveys and observations Ask the group to suggest indicators that would be appropriate for their programs and explain how they would collect the information required to measure achievement of that indicator

- Direct the group to Handbook Annex 5 which contains examples of FP indicators for monitoring quality, service utilization training and integration Point out examples of indicators to measure quality and service and elicit examples or experiences using these indicators

- Introduce CYP calculations and discuss CYP as a performance measure Refer to Handbook Annex 6 and use examples to give participants experience in applying the formulae

- Optional Classroom Exercise Direct the group to worksheet 3A Planning to Measure Results Each NGO should complete this worksheet for the FP service strategy they have selected it can be completed in the classroom or in the evening Drafting objectives is an important step in clarifying a particular strategy Objectives also provide a framework for completing each subsequent step in preparing their integration program concepts Participants should be encouraged to write an objective as a starting point and feel free to revise it as they consider the additional elements of the integration strategy

Worksheet 3a Planning to Measure Results

Illustrative Example

Program Objectives	**Indicators**	**Source of Data for Monitoring Progress**
1 To increase the use of modern family planning methods by 50% among couples in 25 rural communities within 3 years	80 farmer/CBDs will provide FP & ORS services and education to their communities	Training Records Program Reports Summaries of Individual client records CBD register
	3 360 new acceptors achieved through CBD services and referrals	CBD register Mobile Clinic Register

4 Group Exercise **Record keeping and data collection**

- Direct the group to the Handbook - Chart Data Collection Instruments on page 43 and to Annex 7 Routine Records for Family Planning services

- Review the Chart and draw the group's attention to the columns "Purpose" "Data " and "Used By" Make the point that data collection should be very focused and provide only the information that is essential to ensure quality service and the information to monitor and measure results

- Work in small groups assign each group (up to 8 people) responsibility for reviewing the set of records (Handbook Annex 7) for either the clinic or CBD program and ask them to answer the following questions

  - Can you suggest ways to improve these records?

  - Is there a way to incorporate the information on these records with your existing service records?

- How would you go about introducing this set of records into your organization?

- What problems might you encounter in using these records?

- In plenary, conduct a discussion of the records and answers to questions Reinforce the fact that these are sample records and that they may need different information i e more or less, depending upon their ongoing program activities

5 **Monitoring and Evaluation**

OH 9 8- 9 15

- Introduce the concepts of monitoring and evaluation Write "Monitoring" and "Evaluation" as the headings of two columns on the board Ask the group to define and describe the characteristics of each Discuss their answers and put on the board those that are appropriate Summarize by showing the overheads containing definitions and the comparison chart

- Direct participants' attention to the Handbook's Monitoring Plan (pg 45) and the Evaluation Plan (pg 47) Discuss the benefits of using these tools during program planning activities Highlight the relationship between the Objective/ Indicators developed to guide the program and the monitoring plan which builds upon the same Objective and Indicators Direct them to Worksheet 3b "Preparing a Monitoring Plan", ask them to complete this worksheet either in the classroom or after class

Worksheet 3b Preparing a Monitoring Plan

Illustrative Example

Objective Write the objective for your new integrated program

- To decrease the number of pregnancies by 50% among adolescent girls attending schools in the 15 communities in 2 years

Indicators List the indicators you will monitor to measure program success

- Number of teachers delivering FP information
- Number of new adolescent users by method
- Number of pregnancies among adolescent women

Monitoring Process Describe how you will collect information about progress

- Quarterly monitoring of teacher/nurse teams
- Review of monthly Mobile Clinic reports

Records Describe what records you will use to collect monitoring information

- Mobile Clinic Register

Action Describe how you plan to use the monitoring results

- Supervisor reviews reports of achievements with teacher/ nurse teams and mobile clinic staff

- Direct participants to the case study and case review questions on pages 50-51 of the Handbook Display the questions on OH before the participants start reading Ask them to consider these questions while they read the case After 10 minutes lead a discussion of the case **OH 9 16**

Question 1: Who was involved in the evaluation, what was their input and what was their interest in the results.

Information to be covered during discussion

- Nurse Midwife prepared the monitoring and evaluation plan, gathered documentation and established a review process
- CBDs Discussed documentation, provided clarification, discussed obstacles, re-planned work
- IPPF and SAAD Staff Participated in end of project evaluation and decisions about future direction
- The nurse-midwife and CBDs focused on achievement of program results and quality of service to the community
- SAAD and IPPF interested in finding resources to strengthen and expand the project

Question 2: Do you think that IPPF should have shared information about income among the CBDs?

Information to be covered during discussion

There is no correct answer to this question Participants may have strong feelings on either side of the issue The question is raised here to help participants think about issues that may emerge if their program provides CBD income which reflects achievement The trainer should be prepared to discuss participant concerns Participants' comments are likely to include

- CBD income is a tangible measure of success that motivates performance
- Concentrating on financial rewards diminishes the emphasis on commitment to community welfare
- Low performing CBDs will be discouraged from continued participation

Question 3: If you were IPPF, would you change the program and, if so, how?

Information to be covered during discussion

- The IPPF should consider the benefits of adding another nurse midwife to the mobile clinic service and perhaps increasing the frequency of clinics
- The IPPF may want to introduce a sliding scale for fee payment to defer the additional costs of service
- Expansion of the CBD cadre may also be considered

6 Managing Integration

- Review and discuss the chart "Guide for Monitoring Organization Impact" page 49 of the Handbook with the group Elicit examples of obstacles that may be encountered by the participants and discuss how these problems can be avoided
- Introduce Worksheet 3c Managing Obstacles to Integration and explain how this should be completed Ask the participants to work in teams of 2, ideally representatives from the same organization to complete the worksheet

Worksheet 3C **Managing Obstacles to Integration**

Illustrative Example

Column 1	Column 2	Column 3	Column 4
Item to Monitor	Some Predictable Obstacles	Obstacles Your NGO May Encounter	Actions You Can Take to Avoid Obstacles
Internal Factors			
Management Support	Confusion over new role divided commitment to new program	Loyalty to Child Survival Project Discomfort in discussing FP issues	Include existing staff in planning sessions/ setting objectives Provide training in counseling & service delivery Provide supervisory support

OH 9 17-9 22 ▪ Conduct a plenary discussion to review the participants' efforts and summarize the session using the OH Guidelines for Successful Integration

7 **Summarize main points**

OH 9 1 ▪ Review the session objectives to reinforce the main learning points

Session 10: Identify Staffing Requirements

Session Objectives

1 To examine the process for determining staffing needs for a new family planning program

2 To review the issues involved in designing the supervision of a new family planning program

3 To explore the steps in determining training needs

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 SAAD Case Review	Plenary Discussion	20 minutes
3 Estimating Staff Requirements	Plenary Presentation Review of eg on Handbook pg 54 and Worksheet 4a (p 1) Review of eg on Handbook pg 55 Pairs activity - Worksheet 4a (p 2)	10 minutes 15 minutes 15 minutes 15 minutes
4 Designing a Supervision System	Plenary Discussion	15 minutes
5 Defining Training Needs	Plenary Presentation Triad activity -Worksheet 4b Plenary Review	15 minutes 20 minutes 15 minutes
6 Session Review	Plenary	5 minutes
		Total 2 hours 30 minutes

Materials Required

- Worksheet 4a (Pages 1 & 2) and 4b
- OH 10 1-10 5
- Handbook Step 4 Pages 53-62

Trainer's Notes

In session 10, the focus is on helping participants to determine their staffing needs and understand the difference between knowledge and skills, and on designing a program that addresses the training needs of different levels of staff

1 Overview

OH 10 1

- Review Session Objectives

2 SAAD Case Review

OH 10 2

- Direct participants to read the case and case questions on page 61 of the Handbook
- Lead a discussion of the participant responses to the case questions Key points that should come out in relation to each question are below

Question 1 What are the staffing needs that IPPF has identified for the dairy farmer family planning program?

Information to be covered during discussion

Mobile clinic	One nurse/midwife 2 days/month One nurse aide 2 days/month
Other IPPF Staff	Trainers for CBDs

Question 2 Why do you think IPPF included all these areas in the proposed CBD training program? (Alternatively How do you think IPPF determined the CBD's training needs?)

Information to be covered during discussion

- IPPF developed job descriptions (task list) then probably identified the knowledge and skills required to carry out these tasks

Question 3 What is their training strategy trying to achieve?
Information to be covered during discussion ▪ Inform all staff – to make them feel involved and take ownership of the program ▪ To give providers and supervisors the understanding, knowledge and skills to do their jobs effectively ▪ Use knowledgeable and experienced trainers (IPPF) ▪ Recognizes need for refresher training

OH 10 3

3 Estimating Staff Requirements

- Review first two bullets on page 54 of the Handbook (steps 1 and 2 of process for estimating staff requirements)

- To determine the number of staff required for a project, have participants fill out Worksheet 4a (Page 1) in pairs

Worksheet 4a Estimating Staff Requirements (p 1)

Illustrative Example

Task	Staff Category
1 Provide information about FP	CBD
2 Meet with users	CBD
3 Meet with potential clients	CBD
4 Supervise all CBDs	Supervisor

- Reinforce concept by reviewing example on page 54 **OH 10 4**

  Example shows a "task list" which
  1. Defines jobs - helps to design jobs
  2. Helps in determination of number of staff required
  3. Helps to define training needs
  4. Provides foundation for job description
  5. Helps to determine level of job and salary

- Review three bullets at top of page 55 (steps 3-5 of process for estimating staff requirements)

- Work through example Handbook pg 55

250 women not using family planning, perhaps from target population register (refer to SAAD Case on pg 28 of the Handbook)

The figure of # of women per village not using FP is obtained by

dividing the 8,610 (total no of women not using FP)
by 35 (number of villages)

50% of current non-family planning users are targeted to become FP users - i e 125 Of those 125 who may not accept FP at the first attempt, the CBD will try a second time

70 users to be visited each month to resupply pills and condoms as follows

45% x 125 = 57 users of pills

10% x 125 = 13 users of condoms

Total = 70

70 users/month x 12 months x 3 years x 0 4 hours = 1008 hours

Calculating no of staff required

Standard working hours/week x 52 weeks	=	
minus # days public holiday/year x hours/day	=	
minus # days vacation/year x hours/day	=	
minus average # days sick/year x hours/day	=	
Total net hours available for work each year by one staff member	=	

Note These figures will depend on the country and individual organization

- Ask participants to practice their projection skills by projecting the CBD Supervisor time that will be required from the example on pg 54 of the Handbook and using Worksheet 4a (pg 2) Tell them they can use their own experience/judgment to estimate how much time/activity will be needed for each of the 3 listed tasks Tell them they can add other tasks if they feel this is appropriate

Worksheet 4a Estimating Staff Requirements (p 2)

Illustrative Example

Staff Category CBD Supervisor			
Task (a)	Time/Task (b)	No Tasks/Yr (c)	Total Time/Yr (d)
Meet with each CBD bimonthly (80 CBDs) at clinic/community include CBD-client observation)	2 hours/each CBD	480 per year	960 hours per year
Compile summaries of clients contraceptives issued and cash received monthly	2 hours/each month	12 per year	24 hours per year
Total time required in one year			984 hours per year

4 Designing Supervision System

- Review purpose of supervision, discuss benefits of using existing supervisory staff or hiring new ones for the purpose (refer to pg 56 of the Handbook)

5 Defining Training Needs

- Review why training is needed
  - (Remind participants of their earlier responses to the SAAD Case)
- Determining training needs
  - Review steps on page 57 of the Handbook for determining training needs (for a new program) **OH 10 5**
  - Stress the difference between skills (ability to do) and knowledge
- Ask participants to refer back to their task list for the CDB Supervisor (page 54) which they used for their projection of supervisory staffing needs Now ask them to complete Worksheet 4b for a CBD Supervisor, identifying the skills and knowledge requirements for a Supervisor to be able to carry out the defined tasks effectively (Use example on pg 54 of the Handbook as a reference)

Worksheet 4b Determining Training Needs

Illustrative Example

Staff Category	Activities	Required Knowledge	Required Skill
CBD Supervisor	Meet with each CBD monthly	Responsibilities of CBD Knowledge of FP methods use & side effects Problems faced by CBDs	Coaching Interpersonal skills Problem solving skills
	Compile summaries of clients contraceptives used and cash received	Content of records Proper recording procedures Cash handling procedures	Accounting & cross referencing
	Resupply CBDs	Number of contraceptives needed	

6 Session Review

OH 10 1

- Review session objectives, content, and activities

Session 11: Developing a Contraceptive Supply System

Session Objectives

1 To prepare a forecast for contraceptive supply needs

2 To calculate contraceptive stock requirements

3 To review criteria for selecting a reliable supplier of contraceptive methods

4 To consider alternative approaches for distributing contraceptive supplies

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 Forecasting Contraceptive Supply Needs	Plenary Demonstration Practice Session Worksheet 5A	20 minutes 45 minutes
3 Case Study Review	Individual Work and Plenary Discussion NGO Exercise Selecting Suppliers	30 minutes 25 minutes
4 Identifying Suppliers	NGO Exercise Planning for Distribution	20 minutes
5 Storing and Distributing Contraceptives	Worksheet 5B Assessing Requirements for Contraceptive Supply System	30 minutes
6 Session Review	Plenary	5 minutes
		Total 3 hours

Materials Required

- Handbook Step 5 Pages 63-76
- Worksheet 5a and 5b
- OH 11 1-11 10
- Handbook Annex 8 Formula for Forecasting Contraceptive Needs
- Samples of Contraceptives

Trainer's Notes

This session is designed to help participants develop an effective process for managing contraceptive supplies to ensure a steady supply based on an analysis of client need, anticipated method mix and projections for yearly usage A review of appropriate ordering, storage and distribution systems will also be covered

1 **Overview**

OH 11 1

- Present the session objectives, outline the planned activities and the session timeframe

2 **Forecasting Contraceptive Supply Needs**

- Special Characteristics of Contraceptive Supply Systems
  - Introduce the supply system discussion by highlighting the similarities between providing contraceptive supplies and supplying other items needed by field workers Ask the participants to tell you what steps they currently follow to ensure a steady supply of items needed by their field staff such as seeds, fertilizer, books, nutritional supplements, drugs Write the list of the steps mentioned by the participants on the board
  - The list generated by participants is likely to include the following the number of field workers receiving supplies, the rate of consumption per field site, the amount of time between ordering and delivering supplies, the seasonal variations of demand, and the shelf life of the item
  - Next highlight the differences between supplying contraceptives and supplying most other items by introducing the special characteristics of the contraceptive supply system (See Handbook page 64 for details)
- Forecasting Contraceptive Needs

OH 11 2

  - Review the steps to consider when deciding what types of contraceptives should be offered (See the list on page 64 of the Handbook)

OH 11 3

  - Present the steps to follow when forecasting the quantity of contraceptives needed by a program (See Handbook page 65)

- Review the concepts of Contraceptive Prevalence Rate and Method Mix
  - Define Contraceptive Prevalence Rate (CPR) and discuss the use of CPR as an indicator of program success Since CPR measures contraceptive use within the entire population and those people may be receiving supplies from more than one source, it is seldom used as a measure of success of a single program CPR is generally used to monitor prevalence trends In the case of the Dairy Cooperative, SAAD used CPR as a measure of success since SAAD was the only supplier
  - Use the board or the OH to present and calculate the method mix for the SAAD Case Study Check comprehension by changing the percentage for a given method and asking the group to participate in recalculating the projection for the number of clients to receive the method **OH 11 4**
- Calculating Supply Requirements
- Direct the participants to the Example Calculating Supply Requirements on page 68 of the Handbook Review each of the 4 steps in the calculation using the OH projection sheets
  - Step 1 Calculate the number of new clients per year of the program for each method
  - Step 2 For each year calculate the quantity of each contraceptive method needed to supply new clients
  - Step 3 For each year calculate the quantity of contraceptives needed to supply continuing users
  - Step 4 For each year total the amount of supplies needed for both new and continuing clients
- Introduce and explain the formulae for forecasting contraceptive needs given in the Handbook Annex 8 **OH 11 5**
  - Explain Annex 8 in the following manner Under the heading "Continuing User" the Annex gives the quantity required to supply a woman/man for one year Under the heading "New Acceptor" the amount is one half of the yearly requirement This is a planning calculation which allows for the fact that new clients will seek services throughout the year

OH 11 6

- Review the Stock Requirement Calculation for Year 1 New Pill Acceptors

  - Highlight the following information

  1) 45% of all new clients will take pills, thus the total number of pill acceptors is 1512 women over three years

  2) The project planners assume that 30% of all new clients who accept pills will receive services in the first year of the project, i e , 30% of 1512 women or 454 women will receive pills as their method of contraception in the first year of the project

  3) Annex 8 contains the formulae to assist participants in calculating the quantity of pill packets required for 454 women in the first year

  4) Assist the group to calculate the stocks required for women receiving Depo Provera in the first year of the project using the information provided in the example List the results on the board or OH

Calculating Contraceptive Supply for Depo Provera Over Three Years (Use with information in example on Handbook Page 68)

Depo Clients	(New/Year One) 1010 x 20% (Projected % of Users) (New/Year Two) 1348 x 20% (New/Year Three) 1010 x 20%	= 200 = 269 = 202
Year One Supply	200 (New Clients) x 2 doses (Year One) **Total Doses for Year One**	=400 **=400**
Year Two Supply	269 (New Clients) x 2 doses (Year One) 200 (Continuing C)lients x 4 doses **Total Doses for Year Two**	= 538 = 800 **=1338**
Year Three Supply	202 (New Clients) x 2 doses (Year One) 200 (Year One) + 269 (Year Two) (Continuing Clients) **Total Doses for Year Three**	= 404 =1876 **=2280**

- Review the Stock Requirement Calculation for Year 2 New and Continuing Clients accepting Pills and Depo Provera (Calculate using the directions given 1-4 above) OH 11 7-11 8

- Introduce minimum and maximum stock levels and discuss steps to prevent stock shortages (See pages 68-70 of the Handbook for more information)

- Complete Worksheet 5A Calculating Contraceptive Supply requirements (See page 68 of the Handbook)

3 Case Study Review

- Direct the participants to read the Case Study and review case questions on page 76 of the Handbook The case discussion should strengthen participants' ability to OH 11 9

  - Project contraceptive supply requirements

  - Select suppliers

  - Review the merits of charging fees for contraceptives

Question 1 What specific information did IPPF require in order to calculate the contraceptive supply needs?
Information to be covered during discussion - Since no specific information about this community was available the IPPF used the clinic records for a neighboring community to project the method mix for the area served by the farmers - The projections will be changed to reflect actual utilization rates as soon as the information is available from the CBDs After 3 months a pattern should emerge - The IPPF will share their projections with the referral clinics to ensure adequate supplies

Question 2: If, at the end of year one, Depo-Provera acceptance is 30%, what quantity of Depo would be needed in Year 2 of the project?

Information to be covered during discussion

The demand for Depo-Provera is greater than the original projection of 20% Now the project must plan to meet the expected increase in demand during year two The project should use the actual demand experienced in year one to project the year two demands The starting point remains the same, i e 3360 acceptors but now the project should plan to provide 1008 women with Depo-Provera over the life of the project Since 40% of new acceptors for all methods are expected to be served in the second year, the project should be prepared to supply approximately 403 new clients with Depo-Provera To calculate the quantity of Depo required for 403 new clients, refer to Annex 8 for the formula 403 X 2 doses (per new acceptor) The projection for the quantity of Depo needed to serve new acceptors in year 2 is therefore 806 doses/injections

Question 3: Do you think the approach selected to finance the purchase of contraceptive resupplies will be effective? Why?

Information to be covered during discussion

Yes

a) Since the farmers are accustomed to handling money earned through the dairy cooperative activities they should be able to set up and monitor this additional source of revenue

b) The community has a clear need of and desire for family planning services by providing these services the farmers' stature in the community will rise

c) Family planning services offered by the farmers are linked to additional MCH services which are highly prized by the farmers

No

a) Community members may have extremely limited resources and be unable to pay the cost for contraceptives

b) The charge for contraceptives may be insufficient to pay for replacement stocks

c) Free supplies which are given to start a revolving fund for resupply are sometimes wasted, generating little income to finance resupply

4 Identifying Contraceptive Suppliers

- Introduce the topic by restating the session objective Ask the group why it is important to maintain an uninterrupted supply of contraceptives Bring out the following points a) a break in supply can result in an unwanted pregnancy b) women who do not receive contraceptives due to inadequate supplies will lose confidence in the program and may simply not return when the supply is available

- Review and discuss the various sources of supply Ask the participants to share their knowledge about sources of contraceptive supplies in their area Refer to the "Experience from the Field" page 75 of the Handbook and discuss alternative strategies for ensuring an uninterrupted supply of contraceptives

- Lead a discussion of the criteria for selecting a reliable supplier Ask the participants to contribute their ideas for selection, put the list on the board Review and discuss the list of questions presented on page 71 of the Handbook Answers to these questions will assist the NGO to select a reliable supplier

5 Storage and Distribution

- Review the requirements for contraceptive storage space and conditions given in the Handbook Describe the principle of "First to Expire First Out" (FEFO) in managing contraceptive supplies Give out contraceptives and point out labeling information particularly expiration dates or in the case of condoms manufacturing dates Emphasize the importance of monitoring expiration dates and advise them not to distribute expired contraceptives

- Inquire about participant experiences in distributing any type of supply to their field implementation sites Ask the group to describe the characteristics of an effective distribution system and list the information on a board or chart The list should address the following reliability, frequency, security, capacity, protection from climatic conditions and cost

- Discuss alternatives for distributing contraceptive supplies to field workers/field sites Make a list of distribution alternatives that starts with the following distribution options a) other NGOs serving the area b) government distribution systems c) public transportation

Ask for other ideas from the group Form small groups, either members of the same organization or participants from the same country/region Ask the groups to review each distribution option by answering the following questions listed on page 74 in the Handbook

1 Does the distribution route serve your area?
2 How often can delivery be made?
3 Is the capacity of the vehicle sufficient to carry your supplies?
4 Is the service reliable?
5 Is the service secure from theft?
6 Can the commodities be protected from sun, wind and rain?
7 What is the cost of distribution, i e delivery charges, fuel, personnel?

Optional Exercise Complete Worksheet 5B Assessing Requirements for the Contraceptive Supply System The SAAD information can be used

6 Session Review

OH 11 1

- Review the session objectives and summarize the main points

Session 12: Managing Finances for an Integrated Program

Session Objectives

1 To explore issues involved in developing and monitoring a budget for an integrated program

2 To review key concepts in managing cash

3 To examine why cost effectiveness studies are important

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 Preparing a Budget for an Integrated Program	Plenary Discussion Group Activity (Worksheet 6) Debriefing/Review	20 minutes 30 minutes 20 minutes
3 Cost Effectiveness	Plenary Presentation & Discussion	30 minutes
4 SAAD Case Review	Plenary Review	30 minutes
5 Session Review	Plenary	5 minutes
		Total 2 hours 20 minutes

Materials Required

- Activity Briefing Sheet Malika
- Handbook Step 6 Pages 77-84
- Worksheet 6
- OH 12 1-12 10

Trainers' Notes

This session is designed to develop an understanding of the effects that integration may have on budgeting, and of what is meant by cost-effectiveness, how it is measured, and its usefulness in reviewing program results and assessing the need to adjust implementation strategies

1 **Session Overview**

OH 12 1
- Review session objectives

2 **Preparing a Budget for an Integrated Program**

OH 12 2
- Review a definition of a budget and its purpose
  (See Handbook pg 78)

OH 12 3
- Explore budgetary implications of Integration

  - Donor Constraints

    Ask participants to relate their experiences with donors over funding conditions/regulations Stress importance of finding these out early

  - Chart of Accounts

    Define Chart of Accounts as 'categories of income and expenditure defined by an organization' Explore how an NGO's chart of accounts may need to be expanded if FP is integrated New items would probably have to include cost of contraceptives income derived from contraceptives (if these are to be sold), IEC materials purchased

  - Shared Cost

    Explain what is meant by shared costs
    (Page 79-80 of Handbook)

OH 12 4
- Review common examples of shared costs for integrated family planning programs

OH 12 5-12 7
- Review examples of shared costs and how they could be apportioned

- Introduce and discuss The Case of Malika

Group Activity
The Case of Malika

You work for an NGO called Malika Malika works with rural women to train them and support

1. The development and maintenance of income-generating activities (IGAs),

2. The gathering of information about their legal and civic rights,

3. The establishment of day care centers for infants so that the mothers are free to leave home for work

Malika has recently decided to integrate family planning activities into its existing IGA program It will train selected women from the communities in which it has already established IGA groups These women will become CBDs, providing information about family planning benefits and methods, and providing those who request services with regular supplies of pills and condoms

Malika's existing field officers visit the communities every three months, using a Malika vehicle and driver, to check on the IGA programs In the future, the officers will take on the task of resupplying the CBDs with contraceptives and record forms The field officers will take on the task of resupplying the CBDs with contraceptives and record forms The field officers will also collect the CBD's records of their activities and take these back to the Malika Head Office for collation and analysis At the end of each year, the data will be summarized and published in the annual report, which covers the overall activities and costs of Malika's four different programs

Directions

1. Identify the cost items that may need to be shared between programs and record these on the Worksheet 6 in Column 1

2. Identify across which programs these cost items may have been apportioned and record these in Column 2

3. Make an initial decision as to the basis upon which these costs will be apportioned across the relevant programs and record these in Column 3

4. N B Do not try to complete the final column of the Worksheet

- Ask participants to divide into pairs or triads to complete the activity, Worksheet 6 Determining How to Apportion Shared Program Costs Ask each pair or triad to suggest one of the items they have identified where costs will need to be shared across Malika's programs and also ask them to define which programs should share the cost and how these costs might be apportioned Use the notes in the table below to help you

Worksheet 6 Determining How to Apportion Shared Program Costs for Budget Preparation (pg 2)

Illustrative Example

Cost Item	Programs That Share Costs	Basis for Calculating Cost Apportionment
Field Officer Salaries	IGA Family Planning	Proportion of total working time devoted to family planning
Driver Salary	IGA FP	Proportion of total working time devoted to family planning (or maybe easier to divide by 4)
Field Officer Per Diems	IGA FP	% of time spent on each program (average/year)
Vehicle Operation (petrol/oil) and maintenance	IGA FP	% of field officer time spent on average on each program or 50% each
Head Office Salary/ Stationery Costs for data collection & analysis	All 4 programs	Proportion of data analysis time devoted to each program or 25% each

3 **Cost effectiveness**

OH 12 8

- Define cost effectiveness

- Review the steps required to assess the cost effectiveness of a program

OH 12 9

  - Review the examples on pg 83 of the Handbook Ask participants to point out the difference between the two examples (i e Example 1 compares the NGO's CBD program with other CBD programs in the country Example 2 compares 2 approaches to service delivery (CBD & clinic) within the same NGO) Point out the example of cost effectiveness comparison on page 83 of the Handbook Refer participants to commonly used cost-effectiveness indicators on pg 85

  - Warn participants of the importance of considering whether a program may be more expensive for good reasons (e g difficulty of access)

- Close this part of the session by repeating that cost effectiveness is not an absolute, one can only say that a certain approach or strategy is more or less cost-effective than another approach or strategy

- Remind participants that in measuring program costs in order to compare the cost-effectiveness of two programs or approaches, it is very important that the ways in which costs are allocated (apportioned) to the family planning component of each of the programs being compared are the same, or at least "fair"

4 **SAAD Case Review**

- Direct participants to read the Case along with the associated case questions on pg 86 of the Handbook **OH 12 10**

  - Lead a discussion of the participants' responses to the case questions Key points that should be come out of this discussion in relation to each question are given below

Question 1: What costs did the IPPF affiliate decide to apportion between the dairy farmers' CBD program and other IPPF programs, and how did they decide to apportion them?

Information to be discussed during discussion

▪ Trainers/supervisors of CBDs	% of staff time devoted to the CBD program
▪ Fuel costs of mobile clinic	Estimated actual cost

Question 2 What costs of implementing the program do not appear in the budget?

Information to be discussed during discussion

- Accounting costs (head office staff)
- Stationery costs
- IPPF senior management costs
- Other overhead costs (such as IPPF office rent and utilities)
- Cost of services provided to clients referred to the clinic
- Maintenance cost of mobile clinic vehicle

Question 3 Why do you think they did not include these costs in the budget?

Information to be discussed during discussion

- Difficult to apportion
- Costs may make CBD program appear too expensive
- Donor rules about OH costs

Question 4 How have the costs of contraceptives been dealt with in the budget?

Information to be discussed during discussion

- 3 months supply only then revolving fund

OH 12 1

5 Session Review

- Review session objectives and session content

- Optional Discussion You have now completed all chapters of the "SAAD" story To bring closure to the experience, you may want to pause and ask participants to project where they feel the family planning project will be in 5 years time Obviously, there are no correct answers but participants should justify their responses based on issues of institutional and financial sustainability and community involvement

Session 13: Concept Paper Preparation

Session Objectives

1 To formulate a Family Planning Integration Strategy which incorporates the six key components of integration

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary Presentation	5 minutes
2 Review Outline & Concept Paper Preparation	Plenary Presentation & Discussion	25 minutes
3 Determine Presentation Logistics	Plenary Discussion	10 minutes
4 Write/Type Concept Paper	Individual Activity	4 hours (as required) Total Time 4 hours 40 minutes

Preparation

- Administrative support for typing/copying
- Computer/word processor
- Photocopy capability
- Concept Paper Outline (See Session 6)

Trainer's Notes

The trainer should provide a final review of what is expected in the concept paper and facilitate a discussion in which the structure of the presentation session is defined

OH 13 1

1 **Review Outline**

- Review purpose of concept paper and outline

  – Stress it is not a proposal or a 'finished product ' It should reflect the material from the past 4 days, integrating the components into a "concept" relevant for their own organization

2 **Discuss Presentation Logistics**

- Review panel of experts schedule and time limitations

- Participants should decide how to organize and manage presentations, including who will present for each organization, how the information will be shared with panel members, and how time will be managed Presentation options include but are not limited to

  – Making a verbal presentation to accompany the written submission of some or all of the papers

  – Presenting just the content of the concept paper

  – Presenting supplementary information to reinforce the concept

  – Submitting written papers only

- Agree on options so that a schedule can be prepared

3 **Prepare Concept Paper**

- Instruct participants to find a comfortable workplace and to return with their draft by a specified time Ensure them that you are available for consultation during the working process

- Have all participants return to trainers to finalize and type papers All papers should be photocopied and ready for distribution to the panel members Be assertive about this or it will be a long night

- Ask if any participants have special requests for their presentation overheads white boards etc

Session 14: Presentation to Panel of Experts

Session Objectives

1. To present draft concept papers to experts in the field of development

2. To analyze proposals for feasibility, relevance and coherence

3. To review suggestions

Session Guide

Topic	Format	Timing
1 Introductions	Plenary Presentation	15 minutes
2 Oral Presentations	Individual Presentations	60 minutes
3 Panel Discuss "in camera"	Panel Discussion	45 minutes
4 Feedback	Panel Presentation	90 minutes
5 Closing	Plenary Presentation	10 minutes
		Total Time 3 hours 40 minutes

Trainer's Notes

It is helpful to allow time for the panel members to meet before this session so that they (1) have an opportunity to meet each other, (2) develop a system for listening, reviewing and responding to the papers, and (3) appoint a panel chair Once introductions and instructions are completed, the trainer should take an ancillary role and allow the panelists and participants to guide the session

1 **Welcome and Introductions**

- Introduce panel members, participants and trainers
- For clarity, give a brief overview of the Workshop objectives and content, including the 6 steps and the purpose of Concept Paper/Panel Session
- Present a copy of the Concept Paper Outline to familiarize panelists with the paper's expectations
- Emphasize that the panel members are there to provide feedback and not in their role as donors

2 **NGO Oral Presentations**

- Review logistics of presentations with Panel Members Tell them who will be presenting their plan verbally and that written forms of all papers will be provided The panelists will then remove themselves from the group for one hour to discuss the papers and comment on relevance, feasibility, and shortcomings Each panelist will be responsible for in-depth discussion for approximately 3 NGOs Typically, panelists will discuss all the Concept Papers and the assigned panelist will present the comments for his/her NGOs
- Proceed with agreed upon presentation format
  - Allowing 6-10 minutes per NGO, depending on the number of NGOs has worked well

3 **Panelists Meet in Private**

- Closing Workshop details can be handled while panelists are secluded or, if desired, in Session 15

- Distribute and collect evaluation sheets, answer any remaining questions, discuss possible follow-up activities, such as need for additional training, training of trainers or technical assistance for proposal development

4 **Panel Members Feedback**

- Panelists will speak on each concept paper for no more than 10 minutes Trainers should ask panelists if they wish to conduct this part of the session or if they would like the trainers to moderate

- After the panelists give their input, other participants should be encouraged to add their comments

- The NGO participants should be given time to address the panel for clarification or further input

5 **Thanks and Closure**

- The panelists should be thanked by the trainers and the participants If desired the panelists may leave their contact information to enable contact at a later date If appropriate the panelists should be invited for tea or lunch

Session 15: Closing Session

Session Objectives

1 To evaluate the Workshop

2 To discuss possible follow-up options

Session Guide

Topic	Format	Timing
1 Distribute Evaluation Forms	Plenary Presentation	10 minutes
2 Feedback Discussion	Plenary	25 minutes
3 Follow-up Uiscussion	Plenary	20 minutes
4 Farewell		5 minutes
		Total Time 1 hour

Materials Required

- Evaluation Form Trainer's Guide Annex 5a and 5b

Trainer's Notes

Depending on time, the evaluation session can be treated as a separate entity or be combined with Session 14 In either case, sufficient time for filling out the evaluation forms should be allotted The sample provided should be adapted to meet your needs Final photographs follow-up options and closing comments should be programmed into the session

1 **Review Session Objectives**

2 **Evaluation**

- Distribute evaluation forms (sample Annex 5a/b) or design your own and allow 5-10 minutes for completion Ensure all forms are collected

3 **Feedback**

- Open floor for comments on workshop format, contents and suggestions for revisions

- Discuss need for follow-up training, technical assistance, etc

4 **Farewell**

- Thank participants, remind them you will mail a workshop report and final participant list and tell them whom they can contact for further information or training requests

Part Three:

TOT WORKSHOP

Session 1 : Designing an NGO Workshop: Part One

Session Objectives

1 To develop an understanding of how to design Integration Workshops that meet the content and logistical requirements of the participants

Session Guide

Topic	Format	Timing
1 Workshop Objectives	Plenary Presentation	5 minutes
2 Session Overview	Plenary Presentation	5 minutes
3 Review Background of NGOs	Plenary Discussion	60 minutes
4 Defining Mini-Workshop Objectives	Plenary - Brainstorming	30 minutes
5 Defining Content Areas	Plenary - Brainstorming	60 minutes
		Total time 2 hours 40 minutes

Preparation

- Brief on Participating NGOs (NGO Data Sheet)
- Logistical parameters for Mini-Workshop
- OH TOT 1 1-1 3

Training of Trainers Workshop Extended Version

Trainer's Notes

The TOT will prepare participants for the process and content aspects of running a workshop The purpose of this session is to begin the planning for the NGO-Mini Integration Workshop Participants should define objectives, review the background of the NGOs invited, and outline the content of the Workshop

1 **Overview**

OH TOT 1 1

- Present the workshop objectives

OH TOT 1 2

2 **Review the session objectives, activities and timeframe**

3 **Review Background of NGOs**

- Use NGO data sheet to review population served, current program activities, experience in family planning and reason for attending workshop
- Divide participants into small groups and based on data sheets have them score NGOs on knowledge of FP (high, medium, low), attitudes towards family planning (positive, negative) and potential benefits to NGO through integration
- Collate all responses to provide a final picture of training needs

4 **Define Mini-Workshop Objectives**

- As the NGO Mini-Workshop is an abridged version of the Integration Workshop, the trainer should help participants to determine the objective(s) that can be realistically reached given the time allotted background and needs of the participants

OH TOT 1 3

- Give an example of a mini workshop objective if the participants need assistance in constructing an objective

5 **Defining Content Areas**

- Review the key points presented in the beginning of each of the six steps in the Handbook and have participants decide on which are appropriate to include in the Mini-Workshop

Session 2: Deciding Whether to Integrate

Session Objectives

1 To increase knowledge about organizational capacity and community needs for family planning

2 To gather an understanding of potential community resources to assist in designing and implementing a family planning program

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 Minutes
2 Presentation of Case	Plenary	30 Minutes
3 Mapping Community Resources	Small Group Exercise 1	30 Minutes
4 Preparation of Brief	Group Exercise	60 Minutes
5 Presentation to Board	Small Group Exercise 2	60 Minutes
6 Debriefing	Small Group	30 Minutes
		Total Time 3 hours 35 minutes

Materials Required

- Katiwa Case Study
- Exercise 1 Mapping Community Resources
- Exercise 2 Presentation to Board
- OH TOT 2 1

Trainer's Notes

Using the case exercise and simulated board presentation the focus should be on helping participants to consolidate their understanding of the organizational issues, community needs and community resources

OH TOT 2 1

1 **Session Overview**

- Review objectives of the session and planned activities

2 **Presentation of Case**

- Hand out the case study, Katiwa, and allow time for silent reading
- Review content community served, community and organizational resources

3 **Mapping Community Resources**

- Introduce the mapping exercise and explain that the it relates to the community described in the Katiwa case study
  - Have participants work in pairs to fill out the worksheet
  - Review in small group sessions

4 **Preparation of Brief**

- Break into small groups, ideally of not more than six members Each group of six should then break into pairs to begin preparation for the presentation to the board Allow 40 minutes for this assignment and then choose one pair to actually make the presentation The objective of this presentation is to

  1 Convince the management team that your organization should consider integration

  2 Obtain their support for a further investigation of the need for such a program among your constituents and the operational feasibility of adding family planning to your organization's current program portfolio

5 **Presentation to the Board**

- The trainer should select one pair in each group to present the brief to the Board exhorting them to consider adding FP to their current portfolio All other participants will be Board Members, with one elected as Chairperson Other possible roles include school director, politician, land owner, banker The Board will be responsible for asking pointed questions which require the presenters to defend their position and ensure that they have taken into consideration all aspects community needs, organizational capacity and local conditions

6 **Debriefing**

- Lead a discussion about the Board Presentation by asking the group the following questions

  - Did the presenters make it clear what decision they wanted the Board to make?

  - Did the presenters present a convincing case to support their position?

  - Were the presenters able to build on their case when questions were asked by the Board?

  - Were the Board's questions appropriate?

  - Were there questions that the Directors should have asked but did not?

  - Did the Board honestly keep the interests of the organization in mind when asking questions?

  - What things were said by presenters that really engaged the interest and commitment of the Board?

Katiwa

Katiwa is an NGO whose mission is to support the improvement in the lives of rural communities in one of the poorest areas in the country, the District of Marangwanda Marangwanda has a total population of approximately, 80,000 people, of which about 17,600 (22%) are women of reproductive age (WRA) and 50% are of the Muslim faith Katiwa started work in Marangwanda 5 years ago, following a severe 5-year drought during which the population of the District capital grew from 20,000 to more than 35,000 due to the urban migration of subsistence farmers and their families in search of water and work In rural areas in the Northern part of the District, Katiwa provides support to small-scale farmers in the form of loans to buy seeds, fertilizer and technical advice In the District capital, Katiwa has more recently started an evening literacy program for rural women who have migrated to the town with their families The population of the Northern part of the District which Katiwa supports is 15,000, with families living in widely-scattered households The District capital has a lively market on Saturdays, to which the rural farmers and their families bring their produce each week to sell to the women vendors

Health indicators show that Marangwanda District is lagging behind the progress made in other parts of the country The average number of surviving children per family is over 7, with one in five children dying before the age of 5 In the country as a whole, the contraceptive prevalence rate has reached almost 25%, in Marangwanda it is estimated at less than 10%

The north part of the District has no health center and people have to travel to either the hospital in the District capital (ca 30kms) or to a mission clinic just over the District border (ca 10kms), where there are 2 nurse/midwives The Marangwanda District Hospital provides family planning services on one afternoon in mid-week, the two nurses at the mission clinic are trained to provide family planning but are quite busy providing their clinic-based services and outreach immunizations There are a number of private doctors practicing in the District capital

Katiwa employs a full-time Director two program officers, each responsible for one program area, and an administrative officer at its office in the District capital Also working out of this office are 6 agricultural field officers who travel to the northern communities, using motorbikes provided by a Dutch NGO, to meet with the farmers to distribute seeds and fertilizer, and to give advice The literacy program was the idea of a retired teacher in the District capital (now the literacy program officer), and she has found 3 volunteer teachers to provide the evening classes in exchange for a small honorarium Katiwa has a Board of Directors, consisting of local business people and one or two large scale farmers

Approximately 250 kms away in the country's capital are the headquarters of the Ministry of Health and the Planned Parenthood Association, who are working in close collaboration to support improvements and coverage of family planning and reproductive health services in the country The PPA has developed IEC materials which it is willing to provide to national organizations working in family planning The PPA also provides guidance and advice on FP logistics and record systems development to ensure that these comply with national standards The Ministry of Health (through its District offices) provides MCH/FP training to clinical and community-based family planning workers so long as travel and per diem costs are reimbursed, and contraceptive supplies free of charge UNFPA has just initiated an NGO grant program to support health and family planning efforts for underserved populations

Exercise 1: Mapping Family Planning Community Resources

Directions

Use the information in the case example to develop a "map" of existing family planning community services Include the following resources and information

1 Organizations offering services, such as IEC, counseling, contraceptive services

2 Organizations offering referral services

3 Organizations providing training in family planning

4 Organizations providing technical assistance in family planning

5 Organizations providing financial support for family planning activities

6 Sources of IEC materials

7 Sources of contraceptive supplies and

8 Location/Distance of each, i e walking/motoring distance from the community

Worksheet Mapping Existing Family Planning Services

Training of Trainers Workshop Extended Version

This worksheet is intended to help you identify the FP and related services that are currently available in Marangwanda Once it is completed, the worksheet may reveal gaps in services which, when compared with community needs, will assist you to define the gaps that Katiwa might fill

Directions Place the name of the resource organization(s) across the top row Indicate in the column below the type of support they provide

Source › **Community Resources**	*eg Planned Parenthood Association*					
FP Services						
Referral						
Training						
Technical Assistance						
Financial Support						
IEC Materials	*Free At Capital-250 Kms away*					
Contraceptive Supplies						
Other Resources						

Exercise 2: Presentation to the Management Team: Brief for Presenters

You and your partner are members of the NGO Katiwa which selected you to attend the Family Planning Integration Workshop Prior to departure for the workshop, the management team requested that you present a summary of workshop proceedings upon your return The workshop convinced you that Katiwa should explore the possibility of integrating family planning and now you plan to present the rationale for integration in your report to management

You know that in order for an integration strategy to be effective it must have the support and commitment of the community being served as well as the management team of the organization You have prepared the following outline to guide you in preparing the presentation

Organizational Concerns

1 Organizational mission and goals

2 Public image

3 Financial implications

Community Concerns

1 Unmet need for family planning

2 Local support of community leaders religious groups, etc

3 Service gaps

Directions

- Prepare a 10 minute presentation for the management team using the information in the Case Study Katiwa to prepare your presentation Use your imagination on any points that are not presented in the case Don't forget, not everybody understands the benefits of family planning

  The objective of your presentation is two fold

1 To convince the management team that your organization should consider integration

2 To obtain their support for a further investigation of the need for such a program among your constituents and the operational feasibility of adding family planning to your organization's current program portfolio

Be prepared to answer questions from the management team

Session 3: Selecting a Strategy

Session Objectives

1 To select and defend an appropriate service delivery strategy

2 To demonstrate skill in defining and explaining objectives and indicators

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 Minutes
2 Case Brief Service Delivery Models	Plenary Brief Exercise 3	20 Minutes 60 Minutes
3 Presentation	Plenary	60 Minutes
4 Preparing Objectives & Indicators	Small Group Exercise 4	40 Minutes
		Total time 3 hours 5 minutes

Preparation

- Exercise 3 Selecting a Strategy
- Exercise 4 Preparing Objectives & Indicators
- OH TOT 3 1

Trainer's Notes

The purpose of this session is to review the 3 types of CBD programs to help participants choose a strategy that is appropriate for the needs of the organization, the clients and the community They should learn how to justify their selection The second part will make them think about monitoring and evaluation

1 Session Overview

OH TOT 3 1

- Review objectives of the session and planned activities

2 Case Brief Service Delivery Models

- Introduce Exercise 3 and have the group review the 3 types of CBD programs
- Break into small groups and review the directions for the exercise
- Clarify any outstanding issues

3 Presentation

- Have groups present their strategies in plenary session and allow time for questions
- You may choose to use the framework on page 107 to help you summarize the group presentations Copy the framework onto a white board and record the group's responses

4 Preparing Objectives & Indicators

- In their small groups the participants should review Exercise 4
  - Review the definition of objectives and indicators and remind them that their objectives and indicators should relate to the strategy chosen in Exercise 3

Framework for Summarizing Strategy Selection Presentations

Factor	Group A	Group B	Group C
Area of Focus			
Total WRA			
Program Target			
Service Delivery Model			
Clients Per Worker			
Supervision by			
Referral to			
IEC Supplies from			
Contraceptives from			
Other			

Exercise 3: Preparing a Strategy

The management team of Katiwa has given permission for an integration strategy to be prepared The two staff members assigned responsibility for the task have reviewed the community needs mapped family planning resources available to them and analyzed their organization's resources They prepared the following list of characteristics of a high quality, sustainable program to keep in mind as they consider the various service delivery models

1 Choice of family planning methods supply and storage, referral

2 Information and client counseling

3 Staff technically competent

4 Attitudes of family planning providers and interpersonal skills

5 Mechanisms to encourage continuity follow-up, schedule return visits positive relationship with provider

6 Appropriate services location, day/hours of operation, privacy, variety, physical facilities

They also made a list of options for family planning services that seemed feasible for their organization These included

- Type 1 CBD Community Based Agent
- Type 2 CBD Community Based Depot Holder
- Type 3 CBD Community Based Retail Distribution

Directions

Review the information sheet on Katiwa and decide what strategy would be most appropriate for the communities they serve Prepare a description of the strategy, include the following information

1 Target group (characteristics and number to be served)

2 Type of service delivery strategy recommended If CBD strategy is selected, provide information about selection process and number of CBDs/depot holders needed to serve the community

3 Supervisory arrangements

4 Referral arrangements

5 Training needs

6 Supply arrangements

Prepare a description of the strategy for presentation to your small group Be prepared to defend your strategy

Exercise 4 • Preparing Objectives • and Indicators

Directions

1 Prepare objectives and indicators for the family planning service delivery strategy selected in Exercise 3

Objectives	Remember objectives describe the desired situation at the end of the project period Objectives are SMART specific, measurable, attainable, realistic and time bound
Indicators	Measures used to identify whether the intended changes are happening Remember, indicators are measurable, observable and easy to collect

Session 4 : • Forecasting • Contraceptive Supply Needs

Training of Trainers Workshop Extended Version

Session Objectives

1 To demonstrate an ability to forecast contraceptive supply needs

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 minutes
2 Calculating Contraceptive Supply	Plenary Case Exercise 5 in Pairs	30 minutes 15 minutes
		Total time 50 minutes

Preparation

- Exercise 5 Calculating Contraceptive Supply Requirements
- OH TOT 4 1

Trainer's Guide

This session reviews one of the most straightforward concepts - ensuring adequate supply The participants will calculate supply for the service delivery strategy chosen for Katiwa

OH TOT 4 1

1 **Session Overview**

- Review objectives of the session and planned activities

2 **Calculating Contraceptive Supply**

- Review the methods used to calculate the appropriate supply of contraceptives for one year, two years and three years

- Introduce Case Exercise 5 Calculating Contraceptive Supply Requirements, have the participants work in pairs to fill out the worksheet

  - Review in plenary session

Exercise 5: • Calculating • Contraceptive Supply Requirements

Training of Trainers Workshop Extended Version

1 Give the total number of potential clients in the area of your program ____________

2 Estimate the number of people that will be served by your program ____________

3 Estimate how many clients (point 2) will use each of the contraceptive methods offered by your program ____________

The method mix for your area indicates that 25% of the women will accept pills and 20% of the men will take condoms

Pills ____________

Condoms ____________

4 Calculate the total number of each type of contraceptive to be used during the life of your project

Multiply the number of clients for each of the above methods by the quantity of contraceptives needed to provide protection for the chosen period

Pills Number of users X number of packets needed for one year ____________

Condoms Number of uses X number of packets needed for one year ____________

Session 5 • Resource • Analysis

Session Objectives

1 To demonstrate an understanding of "what" resources are needed to effectively implement a FP strategy and "where" to find them

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 Minutes
2 Resources Needed	Plenary	20 Minutes
3 Potential Resources	Plenary Optional Guest Presenter	20 Minutes 60 Minutes
		Total Time 45 minutes Optional Total 1 hour 45 minutes

Materials Required

- OH TOT 5 1
- Optional Local Expert on FP Resources

Trainer's Notes

In this session, you will review the "where can I" or "how do I" of projects Allow enough time for discussion to build or alternatively bring in 'experts' or 'consultants' who can provide additional information about resource availability

1 **Session Overview**

- Review objectives of the session and planned activities

2 **Resources Needed**

- Ask for suggestions as to the type of resources required to implement a feasible strategy (Examples include staff, finance, training, IEC materials)

3 **Potential Resources**

- Review where assistance in obtaining these resources can be found in the organization, community and extended community Alternatively, it may be helpful at this point to bring in local resources, e g FP support groups, funding sources, to discuss ways of using resources

Session 6: Designing a Workshop: Part Two

Training of Trainers Workshop Extended Version

Session Objectives

1 To review the steps involved in designing a Workshop

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 Minutes
2 Workshop Design Session Sequencing & Timing	Plenary	40 Minutes
3 Assigning Trainer Roles	Plenary	20 Minutes
4 Defining Preparatory Assignments	Plenary	30 Minutes
5 Preparation	Paired Activity	4 Hours
		Total time 5 Hours 35 Minutes

Preparation

- Word Processor
- Copy Machine
- Distribute Trainer's Guide

Trainer's Notes

In this session, all details regarding the program, logistical and administrative details and trainee responsibilities should be ironed out leaving time for participants to practice their teaching sessions before the Workshop begins The objective of this session should be to develop an effective program schedule that meets the time limits and objectives stated in session one

1 **Session Overview**

- Review objectives of the session and planned activities

2 **Workshop Design Session Sequencing & Timing**

- Participants should refer to the content teaching areas chosen in session one and list them on the white board in the order they feel they should be presented With an understanding of the total time available for the Mini-Workshop, each session should be assigned a time limit The combined time for all sessions should not exceed the total workshop time available Be sure time is included for discussion and tea breaks

3 **Assigning Trainer Roles**

- Participants should volunteer to research and teach each of the sessions Depending on the number of trainees participating, this can be done in teams of teachers

4 **Defining Preparatory Assignments**

- Those who are not teaching should be assigned administrative functions, e g drafting program schedule copying worksheets, designing a Mini-Workshop evaluation form and ensuring that all materials are ready for distribution

5 **Preparation**

- The remaining time is for executing all administrative jobs in preparation for the Mini-Workshop preparing session objectives and content material

Session 7: • Pre-Workshop • Status Review

Session Objectives

1 To practice presentation skills

2 To further knowledge of working as a team to prepare a workshop

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 Minutes
2 Presentation Skills	Plenary	20 Minutes
3 Status Report	Group Participation	40 Minutes
		Total time 65 Minutes

Trainer's Notes

This is the only time style of teaching and tips on speaking will be reviewed As some participants may be anxious, allow time for questions and discussion Help participants review what tasks remain, ensure responsibility is assigned and see if adjustments are needed

1 **Session Overview**

- Review objectives of the session and planned activities

2 **Presentation Skills**

- A short review of the important speaking tips to improve the effectiveness of the presentation should be made
  - Explain the importance of making eye contact, speaking loudly and clearly, avoiding monotones, and maintaining good posture Stress the importance and proper usage of supportive material, e g white boards, flip charts, overheads, to make points Tips Do not stand in front of material, writing should be legible, message should be short, using key words only, lists should use parallel construction, i e begin all with verbs or nouns but do not mix In a brain-storming fashion review types of presentation styles discussions, lectures, group work, exercises, brainstorming, case studies worksheets and videos etc

3 **Status Report**

- Participants should report back on their accomplishments, tasks remaining and whether they require any assistance
  - Reassign participants as needed to complete last minute tasks
- Review session objectives and content with each teaching team

Session 8 : • Practice • Teaching

Training of Trainers Workshop
Extended Version

Session Objectives

1 To use feedback to improve use of content and style of presentation

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 Minutes
2 Practice Teaching	Small Group Activity	3 Hours
		Total time 3 Hours 5 Minutes

Preparation

- Overhead Projector
- White Board
- Video Camera (optional)

Trainer's Notes

This is the time to assist participants to improve their speaking and presentation skills before the Workshop The facilitator should set up the session so that all receive feedback and have a second chance to present after feedback is given

1 **Session Overview**

- Provide overview of session

2 **Practice Teaching**

- Participants should practice their presentation in front of facilitators, other trainees, and (if available) a video camera and be critiqued as to style and content Do not force people to be video taped but suggest it is helpful to receive feedback either through watching the video or listening to fellow participants A sample schedule can be found on page16

Mini NGO Workshop

Sessions 1-15 of the NGO Mini-Workshop mimic the sessions described in the Integration Workshop but should be revised as necessary to fit the needs of the trainers and participants Existing supporting documents e g agenda OHs, worksheets, evaluation forms should also be reviewed and adapted

Session 9: Evaluation (Follows Mini-Workshop)

Training of Trainers Workshop Extended Version

Session Objectives

1 To determine the effectiveness of the TOT and Mini-Integration Workshop

Session Guide

Topic	Format	Timing
1 Session Overview	Plenary	5 minutes
2 TOT Evaluation	Participant Written Response/Discussion	10 minutes
3 Mini-Workshop Evaluation	Plenary Discussion	30 minutes
4 Farewell	Plenary	5 minutes
		Total time 50 minutes

Materials Required

- TOT Evaluation Form—Annex 5c
- Mini-Workshop Evaluation Form (to be developed by trainers)

Trainer's Notes

This is the time for critical discussion of the TOT workshop, the process of designing and implementing a Workshop, reactions to NGO evaluations, and how to improve the Workshops

1 **Session overview**

- Provide overview of session

2 **TOT Workshop**

- Distribute evaluation forms (sample can be found in Annex 5c) and allow time for completion

- Lead a discussion about strengths and weaknesses of the TOT Workshop as preparation for planning and conducting one's own workshop

3 **Mini-Workshop Evaluation**

- Review Mini-Workshop participants' evaluations

- Allow participants time to discuss their feelings regarding the experience and their effectiveness as workshop designers and trainers

- Close the workshop by discussing how participants will use their new training

4 **Farewell**

- Thank all for their participation

Annex 1: Family Planning Integration Workshop Data Sheet

1 PVO/NGO Headquarter Name Telephone Fax Email	Contact Person Mailing Address
2 Country PVO/NGO Contact Name Telephone Fax Email	Proposed PVO/NGO Participant Designation Mailing Address
3 NGO/Government Partner Contact Person Tel Fax Email	Proposed Participant Designation Address
4 Present program activities	Provide a brief description of the program to which you are thinking of adding or expanding family planning services? If family planning is presently included to what extent IEC ____ Referral ____ Service Provision ____ Other ____
5 Present client group(s)	Estimated number of people served/accessed
6 Types and number of present staff	Types numbers & activities of volunteers associated with present activities
7 Other Relevant information	

Family Planning Integration Workshop Data Sheet [continued]

8 Please indicate any special topics you would like discussed at the workshop	Advocacy ______ Strategic Planning ______ Contraceptive Technique Update ______ Others ________________________

Optional Additions

9 Present Donor Support	Donor	Activities	Amount/Period

Annex 2: Participant Introduction Letter Given at Registration

Welcome to the Integration Workshop

Date

Dear Delegate,

We are pleased that you are joining us for this NGO Integration Workshop and hope you have had a pleasant journey The Workshop will begin at 8 30 AM in the main conference room

By this time you should have received a copy of the Handbook, "Integrating Reproductive Health into NGO Programs, Volume 1 Family Planning" This Handbook will be the main reference document for the Workshop In the pocket of the Handbook you will find a Workshop Agenda and a list of the other participants

In order to prepare for the first session we would like you to read, Step 1 Deciding Whether to Integrate Family Planning" You may also wish to browse through the rest of the Handbook to familiarize yourself with the content

We have included a pre-Workshop questionnaire which we would like you to complete and bring to the first session The questionnaire will help us to understand your current knowledge about family planning so that we can tailor the course content to meet the needs of the participants

We look forward to an interesting Workshop

The Training Team

Annex 3: NGO Presentation

Please limit yourself to five minutes

Briefly State

- Your Name
- Organization
- Location
- Number and Types of Staff

Describe current program activities

- Number & General Characteristics of Population Served
- Current Programs
- Current Program Objective
- Staff
- Target Population

With which specific program have you thought about integrating family planning?

Annex 4a: Pre-Workshop Questionnaire For Health-focused NGOs

In order to help us build your experience and concerns into the meeting, please offer your views on the following issues

1 How does family planning contribute to the reproductive health of women?

2 Comment on the modern family planning methods that you feel most comfortable recommending to couples and explain why

3 Comment on the modern family planning methods that your feel most uncomfortable recommending to couples and explain why

4 At what age do you think one should start using any method of family planning? Please give reasons for your answer

5 Please describe your views with regard to the age when women should begin and complete their families

6 Please share your experience and views regarding reproductive health program for adolescents

7 Please share your experience and views regarding male involvement in family planning programs

Annex 4b: Pre-Workshop Questionnaire For Non-Health NGOs

1 What is Family Planning?

2 List the modern family planning methods of which you are aware

3 List at least 3 advantages of family planning

4 At what age do you think one should start using any method of family planning? Please give reasons for your answer

5 At what age do you think a woman should start having children? Give reasons for your answer

6 At what age do you think a woman should stop having children? Give reasons for your answer

7 What do you consider to be a large family? Please explain your answer

8 How old should the youngest child be for a couple to think of having another child? Give reasons for your response

9 How do you think your organization can benefit if most of the people in the area in which it operates practice family planning?

10 List at least 4 disadvantages of family planning

Annex 5a: Workshop Evaluation Questionnaire

1 In what ways did the workshop meet your expectations?

2 In what ways did the workshop fall short of your expectations?

2 How did you find the organization of the workshop?

3 How did you find the presentation of the materials?

4 Did you like the way you were grouped? Explain your response

5 What did you like most about the workshop?

6 What did you like the least about the workshop?

7 How did the workshop increase your understanding of family planning?

8 How has the workshop helped you to plan integration of Family Planning into your present activities?

9 To improve the effectiveness of the workshop, what changes would you suggest?

Annex 5b: Workshop Evaluation Questionnaire

1 Please rate (using a scale of 1-5 with 1 being low) how well each of the following Steps contributed to your understanding and how relevant it was to your program

	Increased Understanding of the process of integration	Relevance of Step to future program activities
Step 1		
Step 2		
Step 3		
Step 4		
Step 5		
Step 6		

2 Please rate each Step (using a scale of 1-5, with 1 being low) on the following factors

	Time Allotted	Sequence of Content	Mix of Teaching Methods	Pace of Teaching
Step 1				
Step 2				
Step 3				
Step 4				
Step 5				
Step 6				

3 Please comment on the usefulness of the following

Handbook ______________________________

Worksheets ______________________________

Examples ______________________________

Case Study ______________________________

Experience from the Field ______________________________

Overheads ______________________________

Videos ______________________________

Concept paper ______________________________

4 Please rate on a scale of 1-5 (1 = low) how helpful the following were to your learning

- Having your implementing partner with you
- Having representatives from other organizations at your table

5 What did you like most about the workshop?

6 What did you like least about the workshop?

7 How will the workshop help you to plan for or strengthen the integration of family planning into your present activities?

8 To improve the effectiveness of the workshop, what changes would you suggest?

9 Add general comments or impressions

Annex 5c: Family Planning Integration Workshop Week 2—Training of Trainers Evaluation

1 Please rate how well each of the following components of the TOT contributed to your confidence in preparing and teaching a family planning integration workshop

	Very Well	Adequate	Not at All
Review/Revision Phase			
a Mapping community resources	______	______	______
b Presentation to the Board	______	______	______
c Strategy selection	______	______	______
d Objectives and Indicators	______	______	______
Program Design and Preparation			
e Designing workshop objectives and schedule	______	______	______
f Organizing training resources	______	______	______
g Teaching practice	______	______	______
Training Implementation			
h Practice in training administration	______	______	______
i Teaching	______	______	______
j Evaluation training	______	______	______

2 Please give us your comments on the usefulness of actually designing and implementing a workshop for NGO participants

3 What did you like most about the TOT?

4 What did you like least about the TOT?

5 Do you now feel capable of implementing a FP integration workshop? Please give reasons for your answer

6 What changes would you suggest to improve the effectiveness of the workshop?

7 Please add any general comments or impressions

Annex 6: Sample Letter to Panel of Experts

Dear

Re Briefing for Panel Members

Panel Date
Venue
time

During the workshop, participants will work through the 6 decision steps contained in the Handbook, "Integrating Reproductive Health into NGO Programs, Volume 1 Family Planning" On the penultimate day, participants from each NGO/PVO will jointly prepare a concept paper on why and how their own organization intends to implement an integrated family planning program

These concept papers will be presented (in written and verbal forms) to a panel of experts drawn from development agencies The role of these experts will be to provide verbal feedback to participants from each PVO on the relevance, feasibility, and coherence of their ideas and to make suggestions on what further works would need to be carried out before detailed program proposals can be developed Please note that the panel of experts are not expected to respond as representatives of their particular agency to any requests for funding

There will be a total of (insert number) participants at the workshop representing (insert number) different PVOs from (insert number) countries This will mean (insert number) concept papers to be presented and reviewed by the Panel of Experts We are hoping to have at least 5 panel members which will mean that each member will be responsible for reviewing 2-3 concept papers

We anticipate that the program for the panel session will consist of the following

09 00 - 09 15	Welcome and Introductions
09 15 - 10 15	Verbal Presentations of Concept Papers (6 minutes per PVO)
10 15 - 11 00	Panel Members review Concept Papers/discuss in camera
11 00 - 12 40	Panel Members Feedback (10 minutes per PVO)
12 40 - 12 45	Thanks and Closure
12 45	Lunch (optional)

Annex 7a: Family Planning Integration Workshop Prototype Program

Date	Time	Topic
Day 1	AM	Welcome
		Introductions & Expectations
		Introduction to FP
		Development Implications of Family Planning Programming
		Workshop Objectives & Schedule
		Introduction to Handbook
		NGO Program Introductions
	PM	Contraceptive Methods & Messages
		Introduction to the Teaching Case
		Introduction to the Concept Paper
	Evening	Videos on Family Planing Methods, Community-based Distribution, & IEC Strategies
Day 2	AM	*Step 1 Deciding Whether to Integrate Family Planning*
		Step 2 Selecting a Program Strategy
	PM	Sustainability
		Step 3 Measuring Program Results
	Evening	Videos on Family Planing / Concept Paper Preparation

Date	Time	Topic
Day 3	**AM**	*Step 4 Identifying Staffing Requirements*
	PM	*Step 5 Developing a Contraceptive Supply System*
	Evening	Preparation of Concept Paper
Day 4	**AM**	*Step 6 Managing the Finances for an Integrated Program*
	PM	Concept Paper Preparation
	Evening	Concept Paper Finalization
Day 5	**AM**	Presentation and Review of Concept Papers
		Discussion and Planning for Next Steps
		Workshop Evaluation & Closure

Annex 7b: TOT Workshop

Date	Time	Topic
Day 1	AM	Welcome
		Workshop Objectives Designing a Workshop—Part 1
		Deciding Whether to Integrate Katiwa Case Study
		Exercise Mapping Community Resources
	PM	Preparation Presentation to the Board Presentation to Board & Debriefing
		Selecting a Strategy
Day 2	AM	Strategy Presentation
		Preparing Objectives & Indicators
		Forecasting Contraceptive Supply Needs
		Resource Analysis
	PM	Designing a Workshop—Part 2
		Preparation of Teaching Objectives & Key Points
Day 3	AM	Status Review
		Discussion of Teaching Resources, Methods Presentation Skills
	PM	Practice Teaching
Day 4-6		Mini-Workshop
		Evaluation & Closing Session

Annex 8: Annotated List of Videos and Resources

GATHER

A 19 minute training film from Zimbabwe on interpersonal communications skills for family planning counselors, this production outlines the elements of successful family planning counseling based on the acronym GATHER It also models correct behavior for family planning counselors

Produced by the Zimbabwe National Family Planning Council

JIGGASHA (Inquiry)

A 28 minute documentary from the Trishal Thana Project in Bangladesh It describes the attempt to extend the reach of field workers by establishing community meetings called Jiggashas These meetings enable field workers to help others make informed choices for family planning The film explains how representatives are chosen and trained and shows reaction form community members

Produced by AVCom Bangladesh

Videos may also be obtained from the following organizations

- Local Planned Parenthood Associations and offices of the United Nations Population Fund and USAID

- Association for Voluntary and Safe Contraception (AVSC)
  79 Madison Avenue
  New York NY 10016

- Development through Self-Reliance (African films and videos)
  9111 Guilford Road # 100
  Columbia MD 21046

- Family Health International
  Research Triangle Park
  North Carolina 27709

- John Hopkins Program of International Education in Reproductive Health (JHPIEGO)
  Brown's Wharf
  1615 Thames Street
  Baltimore, MD 21231

- John Hopkins University/Center for Communication Programs
  111 Market Places, Suite 310
  Baltimore, MD 21202-4024
  email mmc@jhu edu

Overheads: Family Planning Integration Workshop

Session 1 Workshop Objectives

- To explore strategies for strengthening and expanding family planning as part of an integrated package of services
- To develop a strategy and plan for effective integration of family planning services

Session 1 Workshop Introduction

Session 2 Contraceptive Technology Update

Session Objectives

- **To examine contraceptive options, their effectiveness, safety, and appropriate use**
- **To explore current contraceptive research and its relevance to program strategy**
- **To present counseling procedures as a tool for selection, use, and follow-up**

Session 2 Contraceptive Technology Update 2.1

Method	Female	Male
Surgical	Tubal Ligation	Vasectomy
Hormonal	Pills Implants Injectables	
Intrauterine Devices	IUDs	
Barrier Methods	Diaphragm Cervical Caps Sponge	Condoms
Spermicides	Foam Vaginal Tablets Jelly	
Post Coital	Morning After Pills Morning after IUDs RU 486	

Session Contraceptive Technology Update 2

Traditional Methods

Method	Female	Male
Abstinence	X	X
Lactational Amenorrhea Method (LAM)	X	
Natural Family Planning	Coitus Interruptus Calender Method Basal Body Temperature (BBT) Cervical Mucus Method Symptothermal (BBT + cervical mucus)	Coitus Interruptus

Session 2 Contraceptive Technology Update 2.3

Counseling

Counseling is a vital though often poorly performed part of family planning that helps clients make an informed choice among reproductive options

Counseling is based on

- Sharing information
- Establishment of trust and respect
- Confidentiality and privacy

Skills & Responsibilities

- Focus on clients needs and characteristics
- Ask open-ended questions listen attentively and ensure privacy
- Facilitate discussion and decision making
- Demonstrate method use
- Refer to appropriate follow up
- Understand clients rights
- Make client comfortable
- Provide accurate and unbiased information
- Counter misconceptions

Client assessment

The primary purpose of client assessment is to determine

- that the client is not pregnant
- whether any conditions requiring precautions exist for a particular method
- whether there are any special problems that require further assessment or regular follow-up

GATHER

G Greet client
A Ask about contraceptive needs
T Tell and share information
H Help choose
E Explain and demonstrate
R Return and reinforce

Discuss

- **The reproductive goals of the woman or couple**
- **Subjective factors including time costs or any pain or discomfort the client might experience**
- **Accessibility and availability of other products that may have to be procured to use the method**
- **Reversibility**
- **Short or long term side effects**
- **The need for protection against GTIs and STDs**

Phases of Counseling

- Initial counseling Methods are described and client is helped to choose a method most appropriate for him/her
- Method specific counseling Prior to and immediately following service provision, including instructions on use and side effects
- Follow-up counseling during the return visit use of method, satisfaction and any problems that may have occurred are discussed

Session 3 Introduction to SAAD Case

Session Objectives

- To use the SAAD Case Study as an interactive learning tool for integration strategy development
- To introduce the relationship between the case study and the six steps

Session 3- Introduction to SAAD Case 3 1

CASE REVIEW QUESTIONS

- What do we know about this NGO and its programs?
- How successful is the dairy farming program?
- What problems is the program facing?
- What can we say about SAAD s approach?

Session 3- Introduction to SAAD Case 3-

Session 4 Deciding Whether to Integrate Family Planning

Session Objectives

- To examine the opportunities and constraints your organization may encounter in the process of integrating family planning
- To review information about your community that will help you identify members needs and demands for family planning services
- To practice mapping existing resources and facilities as an aid to decision-making

Session Deciding Whether to Integrate Famil Planning Step 4 1

DEFINITION OF FAMILY PLANNING

- The practice of using traditional or modern contraception to enable couples and individuals in the reproductive age group to make free informed decisions about the timing spacing, and number of children desired, as well as the method of contraception used

Session 4 Deciding Whether to Integrat Famil Planning (Step 1 4.2

BENEFITS OF FAMILY PLANNING

Reduces and prevents maternal and infant morbidity (sickness) and mortality (death) rates due to pregnancy and delivery

- Empowers women by providing them with increased opportunities for participation in educational economic and social activities

Improves general economic status of individuals the family and the community

Session Deciding Whether Integrate Famil Planning Step 1 4 3

Assessing Organizational Commitment

ISSUES TO CONSIDER IF FAMILY PLANNING SERVICES ARE TO BE ADDED OR EXPANDED

- Would the addition (or expansion) of FP be compatible with your organization s mission and goals?
- How would FP impact your organizational image? Would this image affect people s use of family planning services?

Session 4 Deciding Whether to Integrate Family Planning (Step 1) 4 4

Assessing Organizational Commitment cont'd

- **Is FP a national and/or government policy?**
- **Would adding/expanding FP services increase the financial strength of your organization?**
- **Would current funding agencies be supportive of the addition/expansion of FP services?**

Session 4 Deciding Whether to Integrate Family Planning (Step 1) 4.5

CASE REVIEW QUESTIONS

- What information might the SAAD Director have been given that would indicate a need for family planning services?
- What indications of need for health and family planning services did the dairy farmers express?
- What can we say about SAAD's approach to the concerns of the dairy farmers?

Session 4 Deciding Whether to Integrate Family Planning (Step 1) 4.6

Session 5 Introduction to Evening Videos

Session Objectives

- **To acquire additional information about contraceptive method options including how they protect against pregnancy their effectiveness, guidelines for use contraindications and misconceptions**
- **To see examples of successful program strategies such as community based care and clinic services implemented in other developing nations**
- **To observe the steps of counseling clients for FP**

Session 5 Introduction to Evening Video 5.1

Session 6 Introduction to the Concept Paper

Session Objective

- **To understand how the concept paper guides the organization of the integration strategy**

Session 6 Introduction to the Concept Paper 6.1

Concept Paper Outline

I Descriptive Title

Include agency name and location

II Background

a) Population Coverage
b) Characteristics of people currently served by the organization
c) Current program activities
d) Problem Statement
e) Justification for Integration

Session 6 Introduction to the Concept Paper 6

III Strategy

a) State Objective list indicators and performance targets
b) Describe the approach, include the target group, the service delivery strategy and the referral network Include who will carry out the strategy and how they will be supervised
c) Describe what organizations you will work with to implement your strategy
d) Describe how this strategy will fit with the organization s current set of programs Consider the impact of adding this strategy onto existing systems and procedures for planning, monitoring staffing finance and logistics
e) State how the program will be monitored

Session 6 Introduction to the Concept Paper 6.3

IV Sustainability

a) Describe the organization s financial strategy to support family planning integration include fund-raising grants and shared costs

b) Describe how you will continue activities once funding is ended

Session 7 Selecting a Program Strategy

Session Objectives

- To review the elements of quality of care for family planning programs
- To examine family planning service options
- To review and apply principles of referral system design
- To select a service delivery strategy that responds to community needs and meets accepted quality standards

CASE REVIEW QUESTIONS

- Why were the farmers selected to be CBDs?
- What support did SAAD receive from the IPPF?
- What FP services did the SAAD project make available to the community?
- What was the role of the SAAD board in facilitating the project?

Elements of Family Planning Services

A Information, Education and Communication (IEC)

- Family planning messages can be offered in any venue i e clinics, communities, schools, meetings etc
- Messages can be offered even if no contraceptives are provided
- IEC messages should identify service centers

B Counseling for Method Selection

- Counseling enables clients to decide what action is best for them
- Counseling assists clients to decide if they wish to use a family planning method and which method to use
- Counseling assists continuing users to understand and cope with barriers to use such as fear of side effects misinformation and rumors
- Counseling assists continuing users to select alternative methods or discontinue contraception when reproductive goals change

C Contraceptive Method Services

- Method services include support for new acceptors and for clients who require re-supply
- Facilities and training requirements are method specific and range from basic to complex
- Referral networks are required when method services are offered

Type 1· Community Based Agent

- Person selected from within the community
- Trained to guide method selection and to distribute a limited range of contraceptives
- Trained to identify side effects
- Refers for other methods and for additional assistance
- Service offered at a variety of locations homes shops workplaces
- Linked to facility for supplies and supervision

Type 2 Community Based Supply Depot

- Provides a source of re-supply in communities where access is limited
- Clients have received counseling and initial supply from trained health worker
- Depot holders receive limited, job specific training including method use side effects recording and reporting storage and distribution
- Referral and re-supply linked to health system
- Results linked to national statistics

Type 3 Community Based Retail Distribution

- Provides a source of supply/re-supply through existing commercial outlets
- Commercial sales-force trained to screen clients and to refer side effects
- Regular supply maintained through commercial distribution systems
- Typically a wider range of brands and price are available

Clinic Based Services

- Service offered from fixed facilities
- Range of services offered
- Part of the referral chain
  - receiving clients from community based agents, and
  - sending clients for higher level services
- Permanent professional staff trained in IEC, counseling, and provision of contraceptive services

ELEMENTS OF HIGH QUALITY CARE

- Choice of family planning methods
- Clients given information and counseling
- Staff technically competent
- Positive interpersonal relations
- Support for continuity of care
- Appropriate services

Designing the Referral System

1 IDENTIFY REFERRAL SITES

- Location of the referral
- Service schedule
- Services offered
- Cost of methods

2 FORMALIZE REFERRAL RELATIONSHIPS

- Formal commitment from clinical referral points
- CBDs informed about details of clinical referral services
- Clinics and CBD workers have written details of the referral Network to share with clients

3 TRAIN STAFF FOR REFERRAL RESPONSIBILITIES

- Referral network information
- Practice in referral counseling
- Guidance regarding when to refer
- Practice in referral

4 DEVELOP AN INFORMATION SYSTEM

- Document program SUCCESSES
- Monitor the referral process

5 MONITOR AND ANALYZE REFERRAL INFORMATION

- Referrals by method/reason
- Staff referral patterns
- Referral completion rates

Session 8 Sustainability

Session Objectives

- To define what is meant by "program sustainability"
- To explore the factors that contribute to the sustainability of an integrated family planning program

Definition of Sustainability

- <u>Sustainability</u> is the capacity of a program to continue its activities, over the long term, despite changes in its environment A <u>sustainable program</u> is able to make plans for the future, fulfill those plans, and develop diversified sources of income for its activities so that the program is not threatened by the loss of a single funding source

Institutional Factors

- Strategic Planning
- Program Monitoring and Evaluation
- Marketing
- Supply Management
- Human Resource Management

Financial Sustainability Factors

- User Fees
- Subsidies
- Decreasing the cost of services
- Increasing cost-efficiency
- Raising funds

Session 9 Measuring Program Results

SESSION OBJECTIVES

- To examine the importance of objectives indicators and targets in structuring the program
- To review how data collection contributes to management and service delivery decisions
- To examine the use of a monitoring plan as a program management tool
- To clarify the roles of monitoring and evaluation in program management
- To explore ways that NGOs can ensure successful integration

Case Review Questions

Planning for Results

- Does the SAAD objective meet the criteria for a good program objective?
- What are the indicators that SAAD has chosen? Can you suggest any others?
- What do you think IPPF means by performance targets?
- What else can the records be used for- besides helping the CBDs to plan their work?

OBJECTIVES & TARGETS

An objective
is a specific statement of the work that will be carried out

An objective should specify
WHO will do
HOW MUCH
of WHAT and
by WHEN

NOTE Sometimes the "HOW MUCH" is separated from the objective and named "TARGET"

CHARACTERISTICS OF SMART OBJECTIVES

- Specific
- Measurable
- Attainable
- Realistic
- Timebound

INDICATORS

- Indicators are measures used to identify whether the intended changes are happening
- Indicators offer evidence that progress is being made toward achieving the objective
- Indicators do not contain specific targets An indicator is a observable and measurable demonstration of achievement

GUIDANCE FOR SELECTING INDICATORS

- Select only a few
- Choose indicators for which data will be readily available
- Choose indicators that are easy for staff to understand and use for decision making
- Keep data collection to a minimum

Examples of indicators for monitoring FP program achievements

Quality of service indicators

- Percentage of service delivery sites offering a full range of services
- Client continuation rates

Service utilization indicators

- Number of acceptors new to the service delivery site
- Number of acceptors new to modern methods of family planning

Evaluation

A formal review of achievements that compares actual results with the original goals and objectives of a program

Benefits of Evaluation

Evaluation provides evidence of program effects and the relationship between inputs and effects

Evaluation assists the organization to adjust the following elements

- Program focus
- Organizational structures needed for program support
- Program size

Program Monitoring

A type of evaluation that enables managers to routinely observe and measure program activities to determine if they are proceeding as scheduled and if they are producing the desired results

PURPOSE OF PROGRAM MONITORING

- To improve programs by identifying those aspects that are working according to plan and those that are in need of mid-course correction
- To track changes in the services provided and the desired results

The Evaluation Continuum

<u>Process</u>	<u>Results</u>	<u>Impact</u>
How well did the program work?	Did the expected change occur?	Can change be attributed to the program?

Process Evaluation

- How well did the program work?
  - What and how many activities were implemented? *(Quantitative Assessment)*
  - How well were they implemented? *(Qualitative Assessment)*

Session 9 Measuring Program Results 9 13
(Step)

Results Evaluation

- Did the expected change occur
  - At the program level? *(outputs)*
  - At the population level? *(outcomes)*

Session 9 Measuring Program Results 9 14
(Step)

Impact Evaluation

- To what extent can the change be attributed to the intervention?
- Evaluation follows a theoretical model
- Data Gathered Using
  - an experimental or quasi experimental design, or
  - Multilevel longitudinal analysis

Session 9 Measuring Program Results 9 15
Step

Case Review Questions Evaluation

- Who was involved in the evaluation, what was their input, and what was their interest in the results?
- Do you think that IPPF should have shared information about income among the CBDs?
- If you were IPPF, would you change the program and, if so, how?

Session 9 Measuring Program Results 9 16
(Step)

Monitoring Integration Obstacles to integration within the organization

- Management Support
  - Confusion over the organization s new role
  - Divided commitment to the new program
- Staff Acceptance
  - Complaints about workload
  - Poor acceptance of new staff

Session 9 Measuring Program Results 9 17
Step

Monitoring Integration Obstacles to integration within the organization Cont

- Program coordination
  - Variations in pay for similar work
  - Competition for organizational resources

Session 9 Measuring Program Results 9 18
(Step)

Monitoring Integration External Obstacles to integration

- Relationship with other agencies
  - Competition or poor coordination with other service providers
- Client relations
  - Clients unable to accept the organization s role

Session 9 Measuring Program Results (Step 3) 9 19

Monitoring Integration External Obstacles to integration cont

- Community relations
  - Active opposition by religious groups or community leaders
- Donor relations
  - Competing interests of donors

Session 9 Measuring Program Results (Step 3) 9 20

GUIDELINES FOR SUCCESSFUL INTEGRATION

- Highlight how the goals and objectives for integration complement the existing program
- Obtain a clear commitment from management regarding the financial and staff resources that will be required for the program
- Develop agreements between departments that will share resources
- Develop a system for sharing information among departments and programs

Session 9 Measuring Program Results Step 9 21

GUIDELINES FOR SUCCESSFUL INTEGRATION Cont.

- Coordinate program activities with other service organizations to reduce duplication and increase cooperation
- Provide equal pay for equal jobs of equivalent responsibility
- Provide staff with clear and written descriptions of their responsibilities
- Maintain the existing supervision structure whenever possible
- Establish mechanisms for communication between new and existing staff

Session 9 Measuring Program Results (Step 9 22

Session 10 Identifying Staff Requirements

Session Objectives

- To examine the process for determining staffing needs for a new family planning program
- To review the issues involved in designing the supervision of a new family planning program
- To explore the steps in determining training needs

Session Identifying Staff Requirements Step 10 1

SAAD CASE

- What are the staffing needs that IPPF has identified for the dairy farmer family planning program?
- Why do you think IPPF included all these areas in the proposed CBD training program?
- What is their training strategy trying to achieve?

Session 10 Identifying Staff Requirements (Step 4) 10 2

ESTIMATING STAFF REQUIREMENTS

Step 1	Define the activities that are required to implement the program
Step 2	Decide who will carry out these activities
Step 3	Estimate how much time will be required to carry out each activity according to the type of staff
Step 4	Estimate the number of times each activity needs to be carried out (over one specified period)
Step 5	Estimate the total number of staff required by job title

Uses of a "task list"

- Defines jobs - helps to design jobs
- Helps to determine the number of staff required
- Helps to define training needs
- Foundation for job description
- Helps to determine job levels and salaries

STEPS IN DETERMINING TRAINING NEEDS FOR A NEW PROGRAMME

- Clearly define responsibilities/tasks for each type of worker
- Define required knowledge and skills to perform each task
- Determine if proposed workers already have the required knowledge or skills
- Identify Gaps = INITIAL TRAINING NEEDS

Session 11 Developing a Contraceptive Supply System

Session Objectives

- To prepare a forecast for contraceptive supply needs
- To calculate contraceptive stock requirements
- To review criteria for selecting a reliable supplier of contraceptive methods
- To consider alternative approaches for distributing contraceptive supplies

SELECTING TYPES OF CONTRACEPTIVES NEEDED CRITERA

- Contraceptive methods permitted and available
- Program strategy (CBD/Clinic)
- Staff skills and training
- Number of potential clients

Calculating the amount of contraceptives required

- Estimate the total number of potential clients
- Estimate the number of people that your program will serve
- Estimate how many of the clients to be served will use each of the contraceptive methods offered by the program
- Calculate the total number of each type of contraceptives
  - Number of clients for each method multiplied by
  - The quantity needed to provide protection for one year

Formula for Forecasting Supply

	New Client	Continuing Client
Pill Packets	6 5	13
Depo-Provera Injections	2	4

Calculating Supply Requirements

TOTAL NEW CLIENTS	3,360
Total Pill Clients	45 % 3,360 X 45 % = 1,512
Total Depo Clients	20 % 3,360 X 20 % = 672

Projections for Year 1

NEW CLIENTS	FORMULA	STOCKS REQUIRED
Pill Clients Year 1 30% of 1 512 = 454	Packets per New Client 6.5	Packets/Cycles 2,951
Depo Clients Year 1 30% of 672 = 202	Injections per New Client 2	Injections —

Projections for Year 2

NEW CLIENTS	FORMULA	STOCKS REQUIRED
Pills 40 % 605		
Depo 40% 269		

Projections for Year 2

CONTINUING USERS	FORMULA	STOCKS REQUIRED
Pills 454		
Depo 202		

CASE REVIEW QUESTIONS

- **What specific information did IPPF require in order to calculate the contraceptive supply needs?**
- **If, at the end of year one, depo-provera acceptance is 30%, what quantity of depo-provera would be needed in year 2 of the project?**
- **Do you think the approach selected to finance the purchase of contraceptive re-supplies will be effective? Why?**

Selecting a Supplier

Check the reputation of the supplier with others

Ask the following questions

- Is the supplier reliable?
- Is the time between ordering and delivery within an acceptable range?
- Does packaging meet standards i e adequate seals and appropriate labels?
- Does the supplier deliver products with sufficient time before the expiration date?
- Is the price acceptable?

Session 12 Managing Finances for an Integrated Program

Session Objectives

- To explore issues involved in developing and monitoring a budget for an integrated program
- To review key concepts in managing cash
- To examine why cost-effectiveness studies are important

A Budget

is a financial plan that details the types and amounts of resources needed to implement your program

A Budget

- provides potential donors with information about what is needed
- guides spending decisions
- provides a baseline against which to measure actual spending

When FP is being added to an existing program

1) Find out about your donor/s constraints

2) Check your "chart of accounts"

3) Decide how to deal with costs shared by several programs

FOR EXAMPLE

- Staff who work on more than one program
- Transport that is used for more than one program
- Supplies that are used by more than one program

IF YOUR NGO OR YOUR DONOR WANTS YOU TO ESTIMATE THE COSTS OF EACH PROGRAMME THEN YOU HAVE TO

1 Identify the costs that have to be divided

2 Determine all the programs that must share each cost

3 Decide how you will divide each cost fairly among the programs

EXAMPLE 1

- A staff member may spend two days (16 hours) per week on family planning activities and three days (24 hours) per week on adult literacy activities The standard working week is 40 hours
- You could divide the total salary cost of the staff member as follows

  16/40 = 40% to the family planning program

  24/40 = 60% to the adult literacy program

EXAMPLE 2

You may decide that the costs of renting your office space plus the costs of electricity at headquarters should be divided across each of your programs

You could divide the total costs using one of the following formula

- The proportion of all staff who work in each program
- The proportion of headquarters staff time spent on each program

Cost Effectiveness

To assure quality and excellence, you should always try to evaluate the success of different strategies or service sites within the program It is also helpful if you compare the success of your program with those of other organizations

To assess cost-effectiveness, the NGO must

- assign costs to the service to be assessed
- select a quantifiable indicator as a measure of the program s effectiveness
- calculate the cost per indicator by dividing the total costs of the service by the value of the indicator from the program

SAAD CASE

- What costs did the the IPPF Affiliate decide to apportion between the Dairy Farmers CBD Program and other IPPF programs and how did they decide to apportion them?
- What costs of implementing the program do not appear in the budget?
- Why do you think they did not include these costs in the budget?
- How have the costs of contraceptives been dealt with in the budget?

Session 13 Concept Paper Preparation

Session Objective

To formulate a Family Planning Integration Strategy which incorporates the six key components of integration

Overheads: Training of Trainers

TOT Workshop Objectives

- To prepare participants for their role as advocates of integration by reviewing and practicing the FP Integration Steps
- To prepare participants to conduct integration workshops through practice in workshop design and organization, teaching methods and evaluation

TOT Session 1 Designing an NGO Workshop 1 1

TOT Session 1 Designing an NGO Workshop - Part 1

To develop an understanding of how to design integration workshops that meet the content requirements of participants

TOT Session 1 Designing an NGO Workshop 1 2

(EXAMPLE) NGO Mini-Workshop Objective

To introduce ideas and strategies for integrating FP into the existing programs of NGOs

TOT Session 1 Designing an NGO Workshop 1 3

TOT Session 2 Deciding Whether to Integrate

- To increase knowledge about organizational capacity and community needs for family planning
- To gather an understanding of potential community resources to assist in designing and implementing a family planning program

TOT Session 2 Deciding Whether to Integrate 2 1

TOT Session 3 Selecting a Strategy

- To select and defend an appropriate service delivery strategy
- To demonstrate skill in defining and explaining objectives and indicators

TOT Session 3 Selecting Strategy 3 1

TOT Session 4 Forecasting Contraceptive Supply Needs

To demonstrate an ability to forecast contraceptive supply needs

TOT Session 4 Forecasting Contraceptive Supply Needs 4 1

TOT Session 5 Resource Analysis

To demonstrate an understanding of 'what resources are needed to effectively implement a family planning strategy and "where" to find them

TOT Session 5 Resource Analysis 5 1