The Journey: Management Toolkit

The Journey of a global health partnership will present many challenges—logistical, technical, financial, personal, or social in nature. Chapter 7 includes examples of partnerships that have faced such challenges and emerged even stronger than before. One of the central lessons learned from their experiences is that global health teams need to apply greater management discipline to their efforts. This "Journey: Management Toolkit" provides tools to do so and addresses the following:

Research and planning. Partnerships must apply discipline in research and planning to combat the unexpected but inevitable twists and turns in the journey using a flexible approach. Effective management addresses both short- and long-term goals; these are not stagnant but constantly evolving and must be monitored throughout the partnership's journey. Long-term objectives must be modified in light of short-term progress and vice versa.

Measuring and communicating progress. The second component of the Journey: Management Toolkit focuses on the importance of measuring appropriate targets to monitor the partnership's progress and then communicating this progress to key stakeholders to secure their continued support.

Engaging partners in problem solving. The final process in this toolkit deals with maximizing the effectiveness of partner engagement with a focus on productive meetings and the importance of feedback.

The secretariat or the partner responsible for management will probably take the lead in putting these tools to use, but all members of the core team should be involved in applying them to the partnership's work.

MANAGEMENT: The Main Menu

Process	*Tools*
Researching and planning	Problem statement worksheet
	Opportunity matrix
	Consolidated project plan template
Measuring and communicating progress	Balanced scorecard
	Communications plan template
	Worksheet for sharing credit
Engaging partners in problem solving	Checklist for holding productive meetings
	Partner feedback survey: The 10,000-mile checkup
	Milestone-guided activity debriefing

PROBLEM STATEMENT WORKSHEET

During the Journey, partners must answer many questions that have arisen during the First Mile stage of the project. For example, a team conducting an intervention might research the best way to distribute medications. This research could be used to tailor efforts for a geographic region or population or to address problems that arise unexpectedly. This "Problem Statement Worksheet" provides a way for partners to think through a research effort by considering the six essential factors described below it. (Teams can also use the "Problem Statement Worksheet" to apply discipline in discussing uncertainties and to evaluate individual strategies under consideration.)

CENTRAL QUESTION: What is the issue to be resolved?

Context:

Key influencers:

Resource constraints:

Criteria for success:

Areas outside the scope of the project:

Approach for finding the answer:

1. *Context*. What situation led the team to this question/problem?
2. *Key influencers.* Who will influence the decision on moving forward once the answer to the problem is clear? What other political, economic, and social factors can influence the research effort or initiative?
3. *Resource constraints.* What constraints do you face in conducting the research or solving the problem (such as costs, staff, and timeframe)?
4. *Criteria for success.* What criteria will the partners and other stakeholders use for judging the results of your research or the value of your solution?
5. *Areas outside the scope of the project.* What scope limitations do you recognize—for example, are there geographic areas, target populations, or drugs that you will not include in the research?
6. *Approach for finding the answer*. Evaluate planned research or individual strategies under consideration against these criteria.

OPPORTUNITY MATRIX

A global health partnership will likely have an emergent quality; because of this, the value or cost of certain opportunities may fluctuate or new opportunities may present themselves. Therefore, the "Opportunity Matrix" from the "First Mile Toolkit" is repeated to allow modification during the Journey phase. It provides a format for weighing two considerations for various opportunities: value and cost/degree of difficulty. Use this tool by mapping your opportunities in the appropriate quadrants. Opportunities that fall within the lower end of the "Cost/degree of difficulty" spectrum as well as the higher end of the "Value" spectrum are generally more desirable opportunities to pursue. Conversely, opportunities that fall within the higher end of the "Cost/degree of difficulty" spectrum as well as the lower end of the "Value" spectrum are less desirable opportunities to pursue.

Value. What is the relative importance of the activity to the partnership's mission?

Cost/degree of difficulty. Is this activity particularly costly or difficult to sustain?

		Cost/degree of difficulty	
		Low	*High*
Value	*High*	These are going to be your *most* appealing opportunities.	Are these opportunities worth their associated *costs*?
	Low	Are these opportunities *valuable* enough to pursue?	These are going to be your *least* appealing opportunities.

CONSOLIDATED PROJECT PLAN TEMPLATE

Once the overall strategy and the supporting strategies are established, the next step is developing a project plan. The projects that close collaborations undertake can be very complex, with a variety of activities being conducted by different partners simultaneously. The "Consolidated Project Plan Template" provides a way for teams to clarify when activities will be taking place and who will be responsible for each activity.

Activity name	*Start*	*Finish*	*Duration*	*Month (Specify the month(s) in which each activity will take place)*														*Responsibility*
				1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*	*14*	
Activity 1	Month	Month		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	Name 1
Activity 2	Month	Month		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	Name 2
Activity 3	Month	Month		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	Name 3
Activity 4	Month	Month		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	Name 4
Activity 5	Month	Month		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	Name 5

BALANCED SCORECARD

The success of a global health project is determined not only by the impact on targeted populations but also along dimensions such as donor satisfaction, each partner's view of team effectiveness, and program efficiency. A "Balanced Scorecard" can be used to establish measurement standards and performance indicators for each such dimension of project success. This tool gives partners a balanced view of performance that goes beyond traditional financial metrics. Each dimension should have its own measurements of success and performance outcomes. Team members should determine together the measurements they will use to evaluate the activities for each dimension. These metrics should be SMART (Specific, Measurable, Achievable, Realistic, and Timely). The following table indicates what areas may be looked at for improvement. These areas are not exhaustive and are often partnership-specific.

Dimensions (Area of focus)	*Types of things to think about*
Program impact	Ultimate impact we want to achieve (i.e., number of lives improved or saved)
	Different activities we need to perform and complete (i.e., number of people served in target population, number of drugs distributed, etc.)
	Degree to which we completed each activity in the project plan
Team effectiveness	Number of conflicts that go unresolved
	Number of resources actually provided as compared to those agreed upon
	Percentage of activities completed in the project plan

Program efficiency	Degree to which we met scheduled milestones
	Degree to which we kept expenses within original budget
	Degree to which the budget is followed
Donor satisfaction *(*How well are we meeting our donor's expectations?)	Timeliness and usefulness of reports
	Adequacy of communication between partners and donors
	Alignment of donor and program values with strategies
	Ability of partners to leverage donor investments / contributions
	Program sustainability and long-term impact

COMMUNICATIONS PLAN TEMPLATE

The process of keeping all the key stakeholders of a global health effort appropriately informed can be difficult because there are typically many different types of stakeholder groups and the best method of reaching each group is distinct. This "Communications Plan Template" provides a way to think through each aspect of delivering appropriate and timely communications to a key stakeholder group.

1. *Audience.* How would you characterize your audience (for example, a funder or a local advocacy group)?
2. *Objective.* What is the purpose of communicating with this audience (for example, to give updates, to get input, or to get approval)?
3. *Message.* What is the underlying message of your partnership's communication with this audience?
4. *Type of communication.* What channel of communication will you use (for example, an e-newsletter, e-mail, or conference call)?

EXAMPLE FOR ONE STAKEHOLDER GROUP

Audience	*Objective*	*Message*	*Type of communication*	*Frequency*	*Responsibility*	*Feedback method*
Primary funder	Give updates on the partnership's progress.	The partnership is on track to achieve our goal.	E-newsletter	Quarterly	Secretariat	Follow-up phone call by a partner

5. *Frequency*. How often should the partnership communicate with this audience (for example, biweekly, monthly, or quarterly)?
6. *Responsibility*. Who is responsible for this type of correspondence (for example, the staff of the secretariat or a partner)?
7. *Feedback method*. How will you learn about the audience's response to the communication?

WORKSHEET FOR SHARING CREDIT

To support the continued success of a project, it's important to be intentional about sharing credit. A partner organization's sustained support often depends on the amount of credit they receive. So the partners may want to discuss what kind of recognition each of their organizations needs.

External stakeholders, such as local officials and local donors, may also need recognition. Adequately sharing credit can help regional or local stakeholders and officials develop a sense of ownership for the program and feel invested enough to sustain it.

The "Worksheet for Sharing Credit" can serve as a guide for partner discussion and a tool for planning. Sharing credit is an important exercise in strengthening any partnership and should be taken seriously. Credit is infinitely divisible. In completing this worksheet, every partner's needs as well as ideas for how to fulfill those needs to ensure their continued involvement in the partnership are acknowledged.

Partnering Organization	*Recognition needs*	*Opportunities for giving credit*	*Specific activities to give credit*

1. *Recognition needs.* Each partner should have the opportunity to speak candidly about how much and what kind of credit its organization will need to continue its support for the partnership. For example, credit could take the form of local media attention, success visible to a governing body, or recognition for acting as the head of the partnership.
2. *Opportunities for giving credit.* This column can be used by the partners to identify outlets and opportunities to provide that credit.
3. *Specific activities to give credit.* Partners can brainstorm specific activities that provide each partnering organization with the appropriate form of credit. (More than one activity can apply to the same opportunity in the previous column.)

CHECKLIST FOR HOLDING PRODUCTIVE MEETINGS

Item	*Yes*	*No*	*Comments*
BEFORE A MEETING			
Does the meeting have a clear objective?	○	○	______
Has an agenda been created and circulated in advance?	○	○	______
Did all partners have an opportunity to provide input into creating an agenda?	○	○	______
Has a meeting place been found, reserved, and confirmed?	○	○	______
Do meeting ground rules exist?	○	○	______
Are all partners familiar with these ground rules?	○	○	______
Is the decision-making process defined and understood by all partners?	○	○	______
Has someone been designated as the official note taker?	○	○	______

Item	*Yes*	*No*	*Comments*
Are all partners aware of their particular roles and responsibilities for the meeting?	○	○	
Are different partners facilitating different meeting topics?	○	○	
Is there an established method of recording unresolved issues for follow-up?	○	○	
Has background information on topics to be discussed been sent out in advance?	○	○	
AFTER THE MEETING			
Did the facilitator(s) take time at the beginning of the meeting to remind participants of why the issue(s) arose?	○	○	
Did the attendees use the ground rules too while participating in the discussion?	○	○	
Did the facilitator(s) state consensus as it developed?	○	○	
Did everyone participate? If no, what could have been done to achieve full participation?	○	○	
Was the discussion of certain issues hindered because critical members were not present?	○	○	
Did participants agree on next steps, including issues that remained unresolved by the end of the meeting?	○	○	
Were notes taken and distributed in a timely fashion, identifying group decisions, timeline, next steps, and responsibility?	○	○	
Did the meeting begin on time and end on time?	○	○	

PARTNER FEEDBACK SURVEY: THE 10,000-MILE CHECKUP

This worksheet can be used to gather feedback from individuals before a "10,000-Mile Checkup" discussion involving all members of the partnership. The results of the survey can direct and focus the discussion on the perceived strengths and weaknesses of the partnership. Once again, the members of the partnership should agree on the frequency of this feedback loop, by deciding how often the partner feedback survey will be administered and discussed.

	Poorly	*Well*	*Very well*
How well are we communicating with each other?	○	○	○
How well do we identify and handle conflict?	○	○	○
How well do we capture agreements made in the meetings and monitor progress?	○	○	○
How well do partners communicate decisions following a meeting?	○	○	○
How well is the partnership giving and sharing credit?	○	○	○
How well are we adapting to changes in our environment?	○	○	○
How well are we moving toward our goal?	○	○	○
How well are we operating within our budget?	○	○	○
How well are we meeting our milestones?	○	○	○
How well are partners filling the gaps in leadership that arise?	○	○	○

MILESTONE-GUIDED ACTIVITY DEBRIEFING

When your partnership reaches major milestones, it is helpful to capture lessons learned in a constructive way. Both successes and failures present valuable learning opportunities. When debriefing failures, in particular, it's important to follow four important steps:

1. Admit to making the mistake.
2. Learn from the mistake.
3. Warn others before they make the same mistake.
4. Get over the mistake and move on.

This "Milestone-guided Activity Debriefing" worksheet provides a way to debrief projects and adjust the strategic approach depending on what is or is not working.

Aspect	*Notes*
Project to be debriefed	
Project time period	
Date and time of debriefing	
Team members and their roles	
Goals/objectives of the project	
What went well?	
What did not go well?	
What did we learn?	
What would we do differently?	
Did we meet our goals? Why or why not? What changes (if any) are needed in our strategy?	
What message would be valuable to spread to others as a warning?	
What actions need to be taken in order for us to accept the mistakes and move on?	

SUPPLEMENTARY READING FOR MANAGEMENT TOOLS

General

Ertel, D. "Alliance Management: a Blueprint for Success." *Financial Executive* 17, no. 9 (2001): 36.

Goodall, K., and J. Roberts. "Repairing Managerial Knowledge Ability over Distance." *Organization Studies* 24, no. 7 (2003): 1153–75.

Mealiea, L., and R. Baltazar. "A Strategic Guide for Building Effective Teams." *Public Personnel Management* 34, no. 2 (2005).

Mitchell, T. "Team Building 101: A Managerial's Guide to Building a Cohesive Team." *Healthcare Registration* (2004): 3–5.

Parnell, J. "Improving the Fit Between Organizations and Employees." *SAM Advanced Management Journal* 63, no. 1 (1998): 35.

Problem Statement Worksheet

Atlanta Communications Group, LLC. *An Introduction to Problem Structuring.* Atlanta: Atlanta Communications Group, 2001.

Communications Plan

Panteli, N., and R. Davison. "The Role of Subgroups in the Communication Patterns of Global Virtual Teams." *IEEE Transactions on Professional Communication* 48, no. 2 (2005).

Holding Meetings

Brown, J., and D. Isaacs. "Conversation as Core Business Process." *The Systems Thinker* 7, no. 10 (1996–97).