MANAGING THE COMMUNITY HEALTH FUND
Partnership between Communities and the Government

Operations Manual

FACILITATORS' GUIDE

Produced by The Tanzania Ministry of Health with support from the East Central and Southern African Health Community

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About the facilitator's guide

Introduction:

The Commonwealth Health Regional Community Secretariat and The Ministry of Health –Tanzania together have undertaken the development of a CHF Operational manual.

The CHF Operational manual is a model that may be adoptable for use in ECSA countries notably Rwanda, Kenya, Tanzania and Uganda, by District Health Teams and CHF managers.

This document is the facilitators' guide on how to conduct CHF courses using the content of the Operations Manual.

Objective of the guide:

The objective of the facilitators' guide is: To familiarize course organizers and facilitators to the CHF Operations manual content and relevant approaches on how to conduct training using this manual.

Organisation of the facilitators' guide:

The guide is divided into two major parts.

Part one: Gives an introduction to Adult leaning principles.

Part two: Presents the flow of chapters, objectives of each chapter, and Suggested facilitator and participant activities.

Part One: Principles of adult learning

Being an effective instructor involves understanding how adults learn best. Compared to children and teens, adults have special needs and requirements as learners. The following are some of the characteristics of adult learners which a facilitator has to consider when preparing and conducting an adult learning session.

♦ **Adults are autonomous and self-directed.** They need to be free to direct themselves. The teachers must actively involve adult participants in the learning process and serve as facilitators for them. They should allow the participants to assume responsibility for presentations and group leadership.

♦ **Adults have accumulated a foundation of life experiences and knowledge that may include work-related activities.** They need to connect learning to this knowledge/experience base. To help them do so, facilitators should draw out participants' experience and knowledge which is relevant to the topic. They must relate theories and concepts to the participants and recognize the value of their experience in learning.

♦ **Adults are goal-oriented**. Facilitators must show participants how the course will help them attain their goals. Classification of goals and course objectives must be done early in the course.

♦ **Adults are relevancy-oriented**. They must see a reason for learning something. Learning has to be applicable to their work or other responsibilities to be of value to them.

♦ **Adults are practical, focusing on the aspects of a lesson most useful to them in their work.**

They may not be interested in knowledge for its own sake. Instructors must tell participants explicitly how the lesson will be useful to them on the job.

♦ **As do all learners, adults need to be shown respect.** Instructors must acknowledge the wealth of experiences that adult participants bring to the classroom. These adults should be treated as equals in experience and knowledge and allowed to voice their opinions freely in class.

Learning tips for effective facilitation.

♦ **Use multiple media / methods**

Learning results from stimulation of the senses. In some people, one sense is used more than others to learn or recall information. Facilitators should present materials that stimulate as many senses as possible in order to increase their chances of teaching success. Talking alone may not stimulate learning. One has to consider using a variety of teaching Aids, such as projectors, flip charts etc.

Methods may include: Role plays, analysis of case studies, field visit to a practicing facility, lecture discussion and Demonstrations.

♦ **Set a feeling or tone for the lesson**. Facilitators should try to establish a friendly, open atmosphere that shows the participants they will help them learn. This can be done right from the beginning of the course whereby self introductions or peer introductions break ice.

♦ **Set an appropriate level of concern**. The level of tension must be adjusted to meet the level of importance of the objective. If the material has a high level of importance, a higher level of tension/stress should be established in the class. However, people learn best under low to moderate stress; if the stress is too high, it becomes a barrier to learning. The facilitator has to put emphasis on important learning outcomes by increasing time of the topic, seeking opinions from learners, and asking questions to get feedback on the comprehension.

♦ **Participants need specific knowledge of their learning results (feedback).** Feedback must be specific, not general. Participants must also see a reward for learning. The reward does not necessarily have to be monetary; it can be simply a demonstration of benefits to be realized from learning the material or a certificate of attendance.

♦ **Reinforcement.** Reinforcement is a very necessary part of the teaching/learning process; through it, instructors encourage correct modes of behavior and performance. Positive reinforcement is normally used by instructors who are teaching participants new skills. As the name implies, positive reinforcement is "good" and reinforces "good" (or positive) behavior. Negative reinforcement is normally used by instructors teaching a new skill or new information. It is useful in trying to change modes of behavior. The result of negative reinforcement is extinction—that is, the instructor uses negative reinforcement until the "bad" behavior disappears, or it becomes extinct.

When instructors are trying to change behaviors (old practices), they should apply both positive and negative reinforcement.

Reinforcement should be part of the teaching-learning process to ensure correct behavior.

♦ **Retention**. Students must retain information from classes in order to benefit from the learning.

The amount of retention will be directly affected by the degree of original learning. Simply stated, if the participants did not learn the material well initially, they will not retain it well either.

Retention by the participants is directly affected by their amount of practice during the learning.

Instructors should emphasize retention and application. After the participants have demonstrated correct (desired) performance, they should be urged to practice to maintain the desired performance.

Part two: CHF Operations Manual

Chapter One

Concept and design of Community Health Fund

1.1.   Unit Objectives:

At the end of this chapter participants will be able to:

1.   Describe the rationale for Community Health Fund.

2.   Explain the Objectives of the CHF

3.   Outline the Design of CHF

4.   Describe Implementation Status: concerns and challenges of CHF

5.   Explain the success factors of CHF

1.2.   Content

- ♦ Overview of Community Health Fund in Tanzania
- ♦ Objectives of the CHF
- ♦ Design of the Community Health Fund
- ♦ Implementation Status of CHF
- ♦ Implementation Concerns and Challenges
- ♦ CHF Success Factors

1.3. Learning methods

1.3.1. Facilitator / learner activities

The facilitator will lead a "Brainstorming "session with participants on how they perceive the Rationale for Introducing CHF.

The facilitator summarizes by giving additional points from the manual. The rest of the objectives will be facilitated through lecture - discussion method and use of cards.

Chapter two

Setting up structure and operation of CHF

2.1.   Objectives:

At the end of this chapter participants will be able to:

1.   Describe the Pre-requisites and enabling conditions for setting-up community Health Fund

2.   Explain the process for assessing feasibility for starting community fund.

3.   Outline the process for determing overall CHF Costs and premium level.

4.   Describe the Organizational Structure of the Community Hearth Fund.

5.   Explain the procedures for Community Health Fund Operation.

2.2.   Content

♦ Introduction

♦ Pre- requisites and Enabling Conditions

♦ Feasibility of CHF

♦ Determining Benefits Package

♦ Overall CHF Cost and Determining Premiums Levels

♦ Organization Structure

   o Responsibilities of Various Structures and Stakeholders

   o Procedures for Community Health Services

   o Membership

   o Procedures for Accessing Health Services

   o Financial Management Procedures

2.3.   Facilitator/learner activities

The facilitator gives idea cards to each participant. The participant writes on each card the perceived Pre-requisites/enabling conditions for starting CHF.
The facilitator displays the cards and leads a discussion with participants.

The other objectives are facilitated using Lecture –Discussion method.

Chapter Three

Community Health Fund Management Systems

3.1.   Unit Objectives:

At the end of this chapter participants will be able to:

1.   Describe the rules and responsibilities of CHMT in the management of CHF.

2.   Explain the responsibilities of health Facility in CHF.

3.   Outline the procedures for purchasing and issuing a CHF Member Card.

4.   Describe the step for maintaining membership card

5.   Outline the recording process of payment information for patients.

6.   Describe the procedure for maintaing the CHF Financial Ledger.

7.   Outline the Month – End Record Keeping and Reconciliation,

8.   Describe the functions of the CHF software.

9.   Install the CHF software in the computer.

10.   Perform data entry in the CHF software using daily and month-end financial reports.

11.   Interpret CHF annual summary reports.

12.   Describe the procedures for CHMT Supervision visits.

3.2. Content

- ♦ Introduction
- ♦ General CHF Management Responsibilities
- ♦ CHMT Role and Responsibilities
- ♦ Health Facility Responsibilities
- ♦ Purchasing and Recording CHF Membership
- ♦ Procedures for Purchasing and Issuing a CHF Member Card
- ♦ Recording a CHF Member in the CHF Membership Register
- ♦ Maintaining Membership Cards
- ♦ Recording Payment Information for Patients
- ♦ Recording Patient Transactions in the patient Register
- ♦ Recording Patient Information for Patient
- ♦ Preparing a Receipt for All User Fees Paid
- ♦ Daily Recording and Reconciliation of Fees Collected
- ♦ Rules for Daily Reconciliation
- ♦ Depositing Funds at the CHMT
- ♦ Maintaining the CHF financial Ledger, Month- End Record keeping and Reconciliation Procedures for CHMT Supervision Visitors

3.3. Learning methods:

3.3.1. Facilitator/Learner Activities

The facilitator prepares in advance samples of:
♦ Membership card
♦ Membership Register
♦ Receipt Books
♦ Cash Book
♦ Financial ledger
♦ Monthly status Report Summary
♦ Store Ledger

The facilitator introduces each form in turn showing its characteristics, and its use. The form can be displayed using LCD projector or Overhead projector or other visible means.

At each stage the participants are led to fill sample forms manually using hypothetical data/information or if participants have their data this can be used to fill the forms. This can be done in groups of three participants or according to the district. This stage simulates what should be practiced at health centre and dispensary levels.

Once the above step has been finished the facilitator introduces the CHF software functions using lecture discussion and demonstration methods.

The facilitators demonstrate how *to* install the software in the computer. The facilitator should visit each group in the class to ensure that they command this skill.

The facilitator demonstrates how to navigate through the software tracking different outputs.

The participants in-turn are given exercises to practice navigation skills.

Another stage is that the facilitator demonstrates how to enter Monthly reports data from the health facilities in the software.

The facilitator gives an exercise for each group to practice data entry in the software and closely visit each group to ensure that they are doing well.

The facilitator then demonstrates how the software can produce required CHF outputs of monthly and Annual Summaries.

The participants in turn are given the exercise to practice and produce annual summaries

Chapter Four

Management of General Stores: equipment, drugs and medical supplies

4.1.   Learning Objectives:

At the end of this chapter participants will be able to:

1.   Describe the procurement process.

2.   Describe the delivery process.

3.   Explain the Assets inventory Ledger, Bin Card and issue Voucher.

4.   Outline the tools used in stores management using the Indent System.

4.2.   Content

4.2.1. Management of General Stores: Equipment, Drugs and Medical Supplies

♦   Introduction
♦   Procurement
♦   Requisition
♦   Purchasing
♦   Delivery
♦   Assets Inventory Ledger
♦   Bin Cards
♦   Issue of Supplies

♦ Management of Drugs and Medical Supplies (Indent System)

♦ Management Tools

♦ Description and Use of Management Tools

♦ The Use of the Order Form

♦ The Purpose of MSD Pack list and Credit Note

♦ Filling in the Prescribed Drugs in the Patient Register

♦ Prescription Forms

♦ The Dispensing Register (DR)

♦ Injection Register

♦ Monthly Drug Value Summary Sheet (MDVS)

♦ The Stores Ledger

♦ Stock Taking

♦ Supervision

♦ Annex: CHF Management Tools

4.3.   Learning methods

4.3.1. Facilitator/Participants activities

The facilitator should prepare in advance:

♦ Purchase Request form

♦ Purchase Order form

♦ Goods Receipt Note

♦ Goods Discrepancy form

♦ Inventory lesser form

♦ Bin Card form

♦ Issue Voucher

♦ Prescription form

♦ Dispensing Register

♦ Injection Register

♦ Store Ledger

The facilitator prepares in advance data necessary for each form so that it is used for demonstrating to the participants.

Subsequently the participants are given exercises in groups to practice data entry and calculations into the forms or ledger folios.

The forms will be used by participants and facilitators to perform exercises manually.

Annex 1

Workshop Programme

	Day One	Facilitator
08:30 – 09:00	Introduction - Course Prelims	
09:00 – 10:30	Concept and Design of CHF	
10:30 – 11:00	Coffee/Tea Break	
11:00 – 01:00	Setting up – CHF Pre-requisites Feasibility Determining Benefits Package	
01:00 – 02:00	Lunch Break	
02:00 – 04:00	Structure and Organization of the CHF	
04:00 – 04:30	Coffee/ Tea Break	

	Day Two	Facilitator
08:30 – 09:00	Recap	
09:00 – 09:30	Procedure for CHF Operation	
09:30 – 10:30	CHF Management System: Introduction: CHMT roles, HF Responsibilities, purchasing and Issuing CHF Card	
10:30 – 11:00	Coffee/Tea Break	
11:.00 – 01:00	Procedure for Payment of CHF membership. maintaining membership cards Recording Patients Transaction in PT register	
01:00 – 02:00	Lunch Break	
02:00 – 04:00	Daily Reconciliation of Fees collected/ Depositing funds at the CHMT	

	Day Three	Facilitator
08:30 – 09:00	Recap	
09:00 – 10:30	Maintaining the CHF Financial ledger	
10:30 – 11:00	Tea Break	
11:00 – 01:00	Month end Record Keeping and Reconciliation	
01:00 – 02:00	Lunch Break	
02:00 – 04:00	Procedures for CHMT Supervision Visits	
04:00 – 04:30	Tea Break	

	Day Four	Facilitator
08:30 – 09:00	Recap	
09:00 – 10:30	General Introduction to chapter 4 : Procurement, Purchasing Delivery.	
10:30 – 11:00	Tea Break	
11:00 – 01:00	Mgt. of Drugs medical supplies: Indent System Mgt tools, Description and use of management Tools Order Form/Pt Register	
01:00 – 02:00	Lunch	
02:00 – 03:00	Dispensing register injection register monthly drug value summary	
03:00 – 04:00	The stores Ledger, Stock taking, and supervision	

	Day Five	Facilitator
09:00 – 10:00	CHF Soft ware: Introduction to soft ware functions Installing CHF soft ware	
10:30 – 11:00	Tea Break	
11:00 – 01:00	Data entry in CHF Soft ware	
01:00 – 02:00	Lunch Break	
02:00 – 04:00	Data Entry in soft ware	
04:00 – 04:30	Tea Break	

	Day Six	Facilitator
08:30 – 09:00	Recap	
09:00 – 10:30	Data entry in the Soft ware: Output 2	
10:30 – 11:00	Tea Break	
11:00 – 11:30	DATA entry : output 3-Annul Summary report	

	Navigation exercises	
11:30	Course evaluation And closure.	

Annex 11

Course Evaluation

Please respond to the following questions:

1.   (a) Did the Course meet its objectives adequately?

        YES ☐   NO ☐

Please give an explanation for your response

_____

_____

2.   Is the content of the Course relevant to the needs of District Health Management Teams/CHF Managers?

        YES ☐   NO ☐

Please give an explanation for your response

_____

_____

3.   Were methods used to facilitate appropriate?

        YES ☐   NO ☐

Please give an explanation for your response

_____

_____

4.   Was the duration of the Course appropriate to match the content?

        YES ☐   NO ☐

Please give an explanation for your response

_____

_____

5.   Did facilitators provide adequate assistance for you to learn?

YES ☐   NO ☐

Please give an explanation for your response

_____

_____

6.   Please give your opinion on how the Course could be improved in future

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_____
_____
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