

Coordinated Assistance for Reproductive Health Supplies (CARhs)

Strategic Planning Meeting Report

February 11-13, 2014



Reproductive Health
SUPPLIES COALITION

BACKGROUND TO CARHS STRATEGIC PLANNING

CARhs is currently facing a number of strategic challenges that will impact the way the group operates and potentially strain the financial and human resources available to it. First, CARhs is considering expanding the number of countries and programs it seeks to assist. Second, the monitoring of implant flows in association with the new Implants Access Initiative has created a parallel coordination structure with different reporting flows, which requires additional time and resources from CARhs members. Third, new challenges are emerging with other contraceptive methods, namely injectable contraception. These challenges raise a number of questions, including the following: Should CARhs include additional countries/programs, and on what basis should those countries be selected?

- What role does CARhs play in the global contraceptive supply chain?
- Can/should CARhs engage countries in a more direct manner? If so, what form should this engagement take?
- What is the appropriate role for the group members in terms of preventing supply issues from rising to the level of CARhs?

Addressing these challenges presents an opportunity for the CARhs group to improve its operations and increase its impact in addressing supply chain issues. The group does not have any foundational documentation on which to base its answers to the above questions. Moreover, management of CARhs shifted for the first time in over four years to the Reproductive Health Supplies Coalition (RHSC), which is not itself a procurer.

Almost 10 years after that first CARhs call, and given these challenges, it was considered a timely moment to reflect on the purpose of CARhs, how it functions, and how it can best and most strategically move forward. To this end, CARhs decided to undertake a strategic planning exercise culminating in an in-person meeting in February 2014 which is described in this report.

MEETING INTRODUCTION

RHSC convened a meeting of CARhs members and relevant stakeholders in order to establish the group's goals and objectives for the coming three years along with an approach to meeting those goals. The objectives for the meeting were as follows:

- Formalize the vision, goals, and objectives for CARhs in the next three years.
- Review lessons learned and identify areas where efficiency and effectiveness of CARhs can be improved.
- Define goals of country engagement by CARhs membership, which can include the aim of reducing issue escalation to the global level and strengthening overall communication and data visibility.
- Establish criteria and decision milestones to address the question of expanding the Procurement Planning and Monitoring Report (PPMR).
- Develop a three-year implementation plan for CARhs operations.

The first day's sessions were designed to establish a multi-stakeholder overview of the performance and potential of CARhs and included representatives from several partner organizations; the rest of the meeting focused more closely on the identification of strategic priorities for CARhs. A list of meeting participants is attached as Appendix I to this report. The agenda for the meeting is attached as Appendix II to this report. It was known by the end of the first day that a snowstorm in the Washington, DC area was likely to make it impossible for the meeting to take place on the third day (February 13). It was agreed to compress the agenda in order for maximum benefit to be derived from the two days when participants could be together. The key output from the meeting was a draft strategic plan for CARhs, and the presentations are available on the RHSC website; this document serves as a record of some of the key discussions at the meeting that shaped the draft strategic plan.

DAY ONE OVERVIEW

The opening session featured a brief introduction to CARhs. On behalf of the Reproductive Health Supplies Coalition, RHSC Director John Skibiak noted that CARhs is celebrating its tenth anniversary this year and that CARhs has always been at the center of RHSC activities, enabling the Coalition to have a significant impact at the country level.

Ellen T. Tompsett, Trisha Long, and Maggie Murphy gave presentations that summarized the evolution of CARhs, what it does, how it has developed, how it works and assesses its impact, and the issues it faces currently as it plans for the future.

- CARhs brings together representatives of key reproductive health (RH) commodity providers to identify and address imminent supply crises.
- The group shares and analyses information to identify actual or potential supply crises, understands their causes, develops solutions, and, if possible, addresses them in a coordinated manner.
- CARhs provides shipment or other information to countries as requested.
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An analysis of CARhs effectiveness revealed that:

- CARhs currently tracks 13 indicators, in the following three categories:
 - Process indicators:
 - How well is CARhs functioning?
 - Effectiveness indicators
 - How effective is CARhs at resolving issues?
 - Vulnerable country/product indicators
 - Which countries and products are experiencing the most problems?
- Two hundred and twenty seven unique issues appeared on CARhs agendas in 2013.
 - Eighty five percent (194) of them were assigned an outcome.
 - It was noted that CARhs is not necessarily handling more action issues than in the past.
- CARhs does not wait for a stockout before acting.
 - Expediting, postponing, and cancelling shipments are proactive actions to prevent stock imbalance.

An analysis of CARhs current processes found the following opportunities for improved efficiency:

- Clearly define roles and responsibilities in the 'issue follow-up process' and 'decision-making process' (including creating standard operating procedures (SOPs) for product transfers).
- Identify instances where coordinated communication to CARhs member-country representatives and data providers would be advantageous.
- Provide targeted refresher training to countries that continually require significant "back-and-forth" dialogue to finalize reports.
- Each CARhs group member-agency should be represented on every call (identify "back up" representatives).
- Discuss restructuring the format of the final PPMR and utility of a separate region-specific report for west and central Africa (WCA).

Erin Seaver gave a presentation on the case for expanding the PPMR, noting that 2014 presented several opportunities that could be leveraged to support bringing new high-priority countries into the PPMR.

Julie Solo summarized key findings from the CARhs review, focusing on the following questions and conclusions in addition to identifying the need for CARhs to clarify and communicate the purpose and achievements of CARhs:

- Should CARhs do more? Add more countries, but not more products. Provide a more complete picture of stock levels in a country, and do more with data.
- Should CARhs address larger systems issues? Yes, identify best ways to channel this information and key recipients.

- Should CARhs be both preventing and reacting to problems? Clarify this misperception about CARhs and what it does.
- Should CARhs have its own resources? Informants had mixed feelings on this, and it has proven to be complicated to actually implement. Conduct analysis to determine whether access to funds is a barrier to CARhs' ability to resolve problems.
- Should CARhs change its approach to country engagement? CARhs should balance the need to build country capacity with the need for a global group—consider whether CARhs has a role in country capacity building.

The afternoon session focused on how partner organizations interacted with CARhs. Participants were invited to share their experiences of how they currently relate to CARhs and how they would like to envision this interaction in the future. Organizations that did not currently work with CARhs were invited to respond more generally about how they might interact with CARhs in the future. Key points about the current CARhs operation that emerged from this discussion included the following:

- Improving in-country communication would be valuable.
- CARhs could benefit from increased country engagement and greater interaction with country partners.
- More data availability in some of our focus countries would be valuable.
- Attracting more partners around the table (IPPF, MSI, Global Fund) would strengthen CARhs' ability to react.
- More strategic involvement of CARhs members would deepen its impact, and it would be useful to revisit some of the roles of CARhs team members.
- CARhs work and success has limited visibility at present; it is important to raise awareness about CARhs activities and achievements through publications and other outlets.
- More shared financial responsibility for the operating costs of CARhs would broaden ownership and would have the potential to increase buy-in.
- More open and better use of data would be valuable extensions of CARhs' work.
- Better sharing of root causes/intelligence among members would enhance the effectiveness and efficiency of CARhs' work.
- It would be useful to consider a possible expansion to a full market view, which would incorporate the work of social marketing organizations (SMOs), nongovernmental organizations (NGOs), etc., as this would allow for a more comprehensive framework for CARhs' work and potential impact.
- RHSC is keen to maintain its role in CARhs by focusing on the strategic level and support coordination efforts at the country level.

At the end of the Day One, Karen Newman (facilitator) identified some of the issues that had emerged as key themes throughout the discussions. They included the following:

- Country engagement—how to improve in-country co-ordination.
- CARhs' interaction with the Coordinated Supply Planning group—clarifying the relationship going forward was important.
- Establishing guidelines for product transfers would be valuable.
- Current staff capacity needed to be borne in mind, given PPMR expansion plans.
- It was important to separate the identities of PPMR from CARhs.
- PPMR—there were several advantages at the country level of participating, including an increased understanding of how country data is being used. The Total Market Approach was important; there was a rationale for private sector participation.
- There had been inadequate communication about the success of CARhs.
- CARhs' relationship with systems strengthening issues needed to be clarified.
- Expanding CARhs—there was a rationale for including MSI, PSI, and IPPF in the calls and in data collection.

DAY TWO OVERVIEW

At the beginning of the second day of the workshop, it was known that Washington, DC was expecting a serious snowstorm that night. Participants were keen to make the best possible use of the day, given that several participants had to leave Washington that night in order to ensure that they would not be stranded by the storm. As a result of this, the agenda was truncated in order to ensure that as many participants as possible could be present to discuss key elements of the Strategic Plan before participants began to leave the meeting to travel home before the storm.

The day began with a presentation from Ellen T. Tompsett, reviewing key strategic questions; a general discussion took place on these issues, responses to which formed the basis for the development of the Strategic Plan discussed below as well as the beginnings of a long-term vision for both the CARhs and the Coordinated Supply Planning (CSP) groups.

Karen Newman then outlined the process for developing the Strategic Plan, which consisted of arriving at a consensus on the overall objective of CARhs and developing messaging, technical, and operational effectiveness goals, under which CARhs activities would be grouped. Activity portfolios and work plans would be developed for each goal. Participants decided to spend the remaining time together to arrive at consensus on the Overall Objective for CARhs and to draw up a list of key elements for each of the messaging, technical, and operational effectiveness goals. It was further agreed that participants would split into three groups and make every effort to find a way to work in those groups to draft priority actions within each goal, each to be classified under one of the following three categories: essential to achieving the goal, desirable for achieving the goal, and valuable, if funds permit. People primarily responsible for completing each action were identified, together with an approximate timeframe. It was also agreed that it would be beneficial if CARhs could re-brand itself with a new name; participants agreed to think about this issue and come back with ideas.

The main output from this meeting was a draft Strategic Plan, based on the work of these groups, which has undergone revision since the meeting took place. By the end of the second day of the meeting, participants had agreed on the following draft components of the Strategic Plan.

AGREEMENT FOR LONG-TERM VISION

The group spent some time discussing CARhs' interaction with the CSP group. Several modalities were explored, including whether or not the ultimate aim is to merge with CSP or to coexist with it. It was agreed that CARhs and CSP activities are part of a continuous process that includes exceptions management and planning and that CARhs could focus on sending issues "up" to CSP (longer-term, more systemic issues), and CSP would send less "down" to CARhs. Over time and with better planning, theoretically there would be fewer exceptions to manage. It was suggested that using established approaches in the commercial sector such as the Collaborative Planning, Forecasting and Replenishment Model can help to understand how the two groups work together in a continuum.



It was noted that the CSP group will need to formalize its processes first before CARhs can assess how to work and interact effectively with CSP and that meanwhile, CARhs must continue to focus on its exceptions management function. At present, CARhs provides assistance to countries for near-term problems, while CSP provides coordinated assistance to the United Nations Population Fund (UNFPA) and the US Agency for International Development (USAID) to jointly plan for supplies at the global level. In time, CARhs' level of effort may decline, as countries gain ownership and build capacity—although theoretically, success would mean that CARhs would be out of business; realistically there is likely to be a continuing, albeit limited, need for CARhs to intervene at the global level. Strategically, CARhs should promote in-country coordination and ownership, which, if successful, will have the effect of reducing CARhs' role.

The group agreed that the work of both CARhs and CSP is complementary and both entities are essential for optimizing commodity support. This model of two coordination efforts—the former focused on mid- to long-term “planning,” and the latter oriented toward short-term “exceptions management”—is one that has been successful in private industry. The group deliberated extensively about whether CARhs and CSP should be working under the same “identity” as part of a “Coordinated Assistance Program.” It was ultimately agreed that the CSP group would continue to work on establishing its foundational structure, including standard operating processes, roles, and outputs, and then re-enter discussions with the RHSC and CARhs teams regarding a more formalized combined structure in the future.

Participants then discussed critical elements of a CARhs Strategic Plan and agreed to an overall goal, as well as messaging, technical, and operational effectiveness goals, before splitting into groups which agreed to identify goals and objectives under each goal after the meeting finished.

CARHS OVERALL GOAL

CARhs provides a platform for global procurers and country partners to coordinate and share information, promote transparency and country ownership of supply management, generate evidence-based decisions, and take effective action to balance contraceptive supply when unexpected situations occur.

MESSAGING GOAL

To communicate effectively with a broad range of audiences in order to expand engagement of those essential to fulfilling our mission and generate broad-based support for our work.

TECHNICAL GOAL

To ensure that CARhs and its partners are able to share and leverage the technical data and expertise necessary for effective exceptions management and ensure the most effective and efficient use of their resources at the global and country levels.

OPERATIONAL EFFECTIVENESS GOAL

To enable CARhs team members to focus on high value added tasks that support program success. To define and optimize the process and business rules by which the CARhs group operates.

The final version of the strategic plan along with meeting presentations can be found [here](#).

APPENDIX I: LIST OF PARTICIPANTS

First Name	Last Name	Organization
Joseph	Abraham	UNFPA
Cletus	Adohinzin	WAHO
Laila	Akhlaghi	JSI
Alan	Bornbusch	USAID
Clancy	Broxton	USAID
Mina	Gurung	USAID DELIVER
Meba	Kagone	USAID DELIVER
Jamee	Kuznicki	RHSC
Sara	Laaff	JSI
Trisha	Long	USAID DELIVER
Glenn	Milano	USAID
Maggie	Murphy	USAID DELIVER
Karen	Newman	Facilitator
Kristian	Nielsen	UNFPA
Erin	Seaver	USAID
John	Skibiak	RHSC
Julie	Solo	Consultant
Ellen	Tompsett	RHSC

Day One Only		
Anita	Deshpande	RHSC
Veronique	Dupont	RHSC
Sandra	McDonough	DfID
Julia	McDowell	CHAI
Kate	McSheffrey	DfID
Ashley	Nguyen	CHAI
Sangeeta	Raja	World Bank

APPENDIX II: AGENDA

Reproductive Health Supplies Coalition Coordinated Assistance for Reproductive Health Supplies (CARhs) Strategic Planning Meeting, February 11-13, 2014

Purpose:

To bring together members and relevant stakeholders of CARhs in order to establish the group's goals and objectives for the coming three years along with an approach to meeting those goals.

Day 1: February 11, 2014

Objective: To establish a multi-stakeholder overview of the performance and potential of CARhs.

Time	Description
8:30 – 9:00 am	Breakfast (provided)
9:00 – 9:30 am	Welcoming remarks and introductions (Skibiak/Tompsett/Newman)
9:30 – 10:30 am	CARhs – within RHSC and beyond <ul style="list-style-type: none"> • Brief introduction to RHSC and where CARhs fits into its current priorities (Skibiak) • Close-up on CARhs – what it is, history, current status (Tompsett/Long)
10:30 – 11:00 am	Break
11:00 – 12:00 pm	CARhs – how it works, how it's seen <ul style="list-style-type: none"> • Indicators, process mapping (Murphy/Long) • PPMR expansion case (Seaver) • Key findings from the CARhs review (Solo)
12:00 – 12:30 pm	Questions and clarifications
12:30 – 1:30 pm	Lunch
1:30 – 3:00 pm	Interacting with CARhs (Newman intro) <p><i>This session will invite all organizations to comment on how they relate to CARhs at the moment and how they would like to envision this interaction in the future. Those organizations which have been invited to the meeting but are not currently part of CARhs to respond more generally about their supplies work and how they might interact with CARhs.</i></p>
3:00 – 3:30 pm	Break
3:30 – 4:30 pm	Interacting with CARhs (cont'd)
4:30 – 5:00 pm	Summary: Review of day and plans for tomorrow (Newman)

Day 2: February 12, 2014

Objective: To review key strategic questions for CARhs and begin to construct a strategic plan.

Time	Description
8:30 – 9:00 am	Breakfast (provided)
9:00 – 9:15 am	Synthesis of Day One: Shared understanding of what CARhs is and is not (Newman/Tompsett)
9:15 – 9:30 am	Outline of the day: Key elements of strategic plan development; focus on key messaging, technical and operational effectiveness goals
9:30 – 10:30 am	Key strategic questions for CARhs (Tompsett) <ul style="list-style-type: none"> • On what basis or criteria should additional countries/programs be selected for inclusion in the PPMR? • What role does the CARhs play in the global contraceptive supply chain? • How can CARhs support global efforts to manage anticipated supply

shortfalls or other related issues? (e.g. How can we complement the ongoing Implants Access Initiative?)

- Can/should CARhs engage countries in a more direct manner? If so, what form should this engagement take?
- What is the appropriate role for the group members in terms of preventing supply issues from rising to the level of CARhs?

10:30 – 11:00 am	Break
11:00 – 12:00 pm	Key strategic questions for CARhs (cont'd)
12:00 – 1:00 pm	Development of a purpose statement for CARhs
1:00 – 2:00 pm	Lunch
2:00 – 2:15 pm	Outline of CARhs messaging, technical and operational effectiveness goals (Newman) – key topics for inclusion
2:15 – 2:45 pm	Key elements of messaging goal (internal and external)
2:45 – 3:15 pm	Key elements of technical goal
3:30 – 4:00 pm	Break
4:00 – 4:20 pm	Key elements of technical goal (cont'd)
4:20 – 4:40 pm	Key elements of operational effectiveness goal
4:40 – 5:00 pm	Summary of the day and plans for tomorrow (Newman)

Day 3: February 13, 2014

Objective: To agree on core elements of CARhs strategic plan.

Time	Description
8:30 – 9:00 am	Breakfast (provided)
9:00 – 9:15 am	Synthesis of Day Two/outline for the day (Newman/Tompsett)
9:15 – 10:30 am	Activity plan for messaging work
10:30 – 11:00 am	Break
11:00 – 12:00 pm	Activity plan for technical work
12:00 – 1:00 pm	Development of a purpose statement for CARhs
1:00 – 2:00 pm	Lunch
2:00 – 2:30 pm	Activity plan for ensuring CARhs operational effectiveness
2:30 – 3:00 pm	Review of skeleton strategic plan
3:00 – 3:30 pm	Identification of missing elements
	Discussion of resource requirements (human/financial), capacity development etc.
3:30 – 4:00 pm	Break
4:00 – 5:15 pm	Discussion of next steps
5:15 – 5:30 pm	Wrap-up (Tompsett/Newman)

Directions to the PATH Office can be found [here](#). A map with nearby hotels can be found [here](#).
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