

PSM Toolbox Project

Working Group Meeting

9-10 October, 2008
Woerden, the Netherlands

Final report

Table of Contents

Table of Contents	2
Introduction	3
Day 1 – 9 October 2008: Evaluation of the PSM Toolbox CD-ROM and website.....	3
PSM Toolbox project update	3
Evaluation of the PSM Toolbox CD-ROM.....	4
Evaluation of the PSM Toolbox website.....	5
Multiple tools for the same PSM process.....	6
Day 2 – 10 October 2008: Future plans for the PSM Toolbox CD-ROM and website	6
One year after the launch of the PSM Toolbox project – what do the users think?	6
Marketing plan for the CD-ROM and website.....	6
Definition of tool inclusion criteria	7
New tools, expansion into other diseases and possible translation of the PSM Toolbox.....	8
Harmonization of PSM tools	8
List of actions for the coming months	8
Annex 1 PSM Toolbox meeting agenda and participants.....	11

Introduction

The first PSM Toolbox working group meeting took place end of January 2008 at the IDA Solutions office in the Netherlands. It was attended by representatives from AMDS/WHO¹, USAID | DELIVER PROJECT², ReMeD³, ESTHER⁴, Consultants for Health & Development⁵, Clearsite Multimedia Design⁶ and IDA Solutions⁷. At this meeting several suggestions for improvement of both the CD-ROM and the website were made by the participants. Subsequently both products were updated.

This second working group meeting is aimed at reviewing the second edition and suggesting other opportunities for expansion and marketing. New invitees include representatives from UNDP⁸, SCMS⁹ and MSH¹⁰. The full meeting agenda and participant list can be found in Annex 1 of this document. Since some international invitees could not attend the meeting in person a decision was made for them to join by teleconference.

Day 1 – 9 October 2008: Evaluation of the PSM Toolbox CD-ROM and website

Clarisse Morris of IDA Solutions welcomed the meeting participants after which Vincent Habiyambere discussed the meeting objectives:

1. To update participants on progress made since the PSM Toolbox was launched.
2. Evaluate the current toolbox website & CD Rom.
3. Define criteria for inclusion of tools.
4. Guidance for users to choose tools on one PSM area.
5. Discuss harmonization of some tools.
6. Next steps:
 - Expanding (TB, HIV...);
 - Assessment from users;
 - Marketing strategy.

PSM Toolbox project update

An update of the PSM Toolbox project was provided starting with a brief description of the overall progress since the inception followed by a more detailed overview of the progress since the last working group meeting. The tool categories were changed and a translation of the Toolbox into French was established. The project was promoted on several occasions e.g. a symposium on Access to Health Care in South Africa, a procurement meeting organized by the Open Society Institute in Ukraine and the International AIDS Conference in Mexico. A demonstration video of the website was also developed in English and made available online.

Since the last meeting (30 January 2008) the number of website visitors increased from 4,552 to 26,578 and the number of countries they originate from increased from 91 to 133. The

¹ World Health Organization, AIDS Medicines & Diagnostics Service, <http://www.who.int/hiv/amds/en>

² USAID | DELIVER PROJECT, <http://deliver.jsi.com/dhome>

³ Réseau Médicaments & Développement (ReMeD), <http://www.remed.org>

⁴ Ensemble pour une Solidarité Thérapeutique Hospitalière En Réseau (ESTHER), <http://www.esther.fr>

⁵ Consultants for Health Development (CHD), <http://www.chd-consultants.nl>

⁶ Clearsite Multimedia Design, <http://www.clearsite.nl>

⁷ IDA Solutions, <http://www.idasolutions.org>

⁸ United Nations Development Program (UNDP), <http://www.undp.org>

⁹ The Supply Chain Management System (SCMS), <http://scms.pfscm.org/scms>

¹⁰ Management Sciences for Health (MSH), <http://www.msh.org>

number of tools in the database was increased from 89 English tools to 116 English and 27 tools in French.

Please find the top ten countries in terms of website visitors below:

No.	Country	Visitors
1	USA	16,742
2	Netherlands	1,242
3	UK	759
4	Germany	736
5	France	697
6	Russia	481
7	Switzerland	427
8	Denmark	324
9	South Africa	244
10	China	236

Most of the website visitors still come from Western countries. It is not clear why more than 50% of the visitors are coming from the USA. Clearsite Multimedia Design, the website developer, will investigate this further.

The regional distribution of the 26,578 website visitors is as follows:

No.	Region	Visitors
1	North America	16,937
2	Western Europe	5,050
3	Eastern Europe	1,165
4	Asia	1,056
5	Anglo – and Lusophone Africa	955
6	Francophone Africa	522
7	Middle East	399
8	Central & South America	209
9	Caribbean	140
10	South Pacific	140
11	Unknown	5

For this overview it was suggested to mention the Lusophone countries separately, rather than adding them to the Anglophone countries as it is mentioned at the moment. Further to the number of website visitors the working group would like to know which tool categories are visited the most. This will provide information on which PSM area is of most interest to the users.

Evaluation of the PSM Toolbox CD-ROM

In general the CD-ROM was stated to be easy to use. In addition the new categories make more sense. It was mentioned that in the “Cost” column of the Excel sheet the terms –free- and –none- are both used. A choice should be made between the two. Secondly, if a tool is available in more than one language the tool details are only mentioned in the English tool description. This should be copied to the other languages as well, since it is not clear at the moment. In addition the “When to use” information should be translated in all relevant languages by the WHO Regional Offices. They will need to be contacted for this by WHO headquarters in Geneva. Quality Assurance should be added as a new category; currently QA related tools are mentioned in other categories e.g. selection, policy.

There were also some tool specific comments. In the “Inventory management” category the MIL tool from Missionpharma¹¹ was included on condition that it would be made available to non-Missionpharma customers shortly. This needs to be followed up. In the “Use” category it should be made clear when MSH’s ART dispensing tool will be available. In the “Pricing” category it was noted that the Global Price Reporting Mechanism contains more information than the Global Fund Price Reporting Mechanism, since the latter is specific for the Global Fund¹². The difference between the two tools should be made clearer in the database.

Since more and more tools are being added to the toolbox it is becoming difficult to quickly find the required tool. It was suggested to change the interface by using Access and Visual basic to make it more user-friendly and easier to search. João Teixeira offered to look into the possibilities and make an example. He also mentioned that procurement & supply management and PSM do not ring a bell with many physicians and pharmacists in the field. A further explanation of what this means is required e.g. by a slogan or listing the categories in the website banner. The PSM cycle should also be put on the homepage and the CD-ROM introduction text.

Evaluation of the PSM Toolbox website

Overall the website was positively evaluated by the chairpersons. The chairpersons made several suggestions for improvement. First of all the word “Category” should be changed to “PSM area” since this is more specific to the content. Currently some website visitors use the English open search engine and enter French words. This does not work at the moment. A link should be made between the English and French tool database so that it no longer matters which search engine is used. It was also recommended to add the option of “All” to the “Level of use” category, meaning that a tool is suitable for use at all levels of the PSM system. Some information on tools in the database did not correspond to the tool that is actually available on the developer’s website. This information should be synchronized.

The weekly tool highlight and the tool news features were much appreciated. A developer can contact the website administrator if he/she wants to mention something about a tool e.g. an update, new feature in the tool news section. The weekly tool highlight randomly selects a tool to be featured on the homepage. It is not possible to request a certain tool to be highlighted deliberately. The demo videos, which have been online for about a week, were accessed many times. The group recommended adding a voice over to the currently mute video. This will make it more attractive. However, any changes to the website need to be incorporated first, followed by a revision of the demo videos. Afterwards they can also be translated into French. It was also agreed to make the “Submit a tool” feature more user-friendly by making the whole process web-based. The Excel sheet will no longer have to be downloaded and forwarded.

Extension to other diseases is still an option. An attempt to work with the Roll Back Malaria PSM working group did not move beyond the initial stage due to financial constraints at RBM. WHO/AMDS will discuss with RBM and also the Stop TB group to see how their tools could be included in the existing PSM Toolbox. In this light the group recommended adding disease related categories and commodity related categories. This means other diseases and commodities can be included, but it should still be easy for a visitor to find the required tools. Clarisse requested the other group members to send any tools for TB medicines, anti-malarials and diagnostics in preparation for expansion of the PSM Toolbox.

The usefulness of the forum was put on the agenda once again. No posts have been made for several months. The working group suggested adding the possibility to comment at the bottom of each tool detail sheet on the website. This is easier than having to register before you can

¹¹ Missionpharma, <http://www.missionpharma.com>

¹² The Global Fund to fight AIDS, TB & Malaria, <http://www.theglobalfund.org>

post something on the forum. However, without registration it is likely that spam or other unwanted content is put on the website. The security measures for this option need to be investigated before a decision about the implementation can be made.

Multiple tools for the same PSM process

Vincent Habiyambere explained the difficulty that toolbox users face when confronted with 5-6 or more different tools for the same PSM area. During this session it became clear that the tool characteristics used to describe each tool in the database should be used to choose between multiple tools for the same process. It was stressed that tool developers need to be as specific as possible as to the features and use of their tools so that the website visitors clearly see what the difference is between the tools. Once they have narrowed down the number of options, they should contact the organizations to explain their situation and what tool they require.

Day 2 – 10 October 2008: Future plans for the PSM Toolbox CD-ROM and website

One year after the launch of the PSM Toolbox project – what do the users think?

At the end of 2008 the PSM Toolbox website will have been live for one year. In that period several meetings were organized to discuss the progress and to make recommendations for improvement. However, the meeting attendees were mainly PSM- and public health experts from tool developing organizations. Very little feedback was received from the target group: health professionals in low and middle income countries. The suggestion to organize a review of both the PSM Toolbox website and CD-ROM was welcomed by the group, although it was recognized as a potentially difficult exercise. How can people be motivated to fill in a questionnaire? Offering a small prize like a WHO publication or the PSM Toolbox CD-ROM V3 was mentioned as an option. This will need further investigation. It was also mentioned that there should be a clear separation between an evaluation of the website and CD-ROM to avoid confusion. Not everyone who uses the website also has/uses the CD-ROM and vice versa. Topics of the evaluation will be related to user-friendliness, content, and also the users themselves e.g. their level of work and how they use the toolbox in their work. This information should help further fine-tuning of the website and CD-ROM. A proposal for the evaluation methodology and objectives will need to be drafted.

Marketing plan for the CD-ROM and website

Looking back at the website visitor statistics we would like to see more visitors from the target audience. The marketing activities should be geared at this group. Hilbrand Haak suggested collaborating with the large HIV/AIDS partners like UNAIDS¹³, UNDP and the Global Fund. This means more than just sending the CD-ROMs; we need buy in from these organizations so that they see the PSM Toolbox as a valuable addition to the work their staff and partners do in-country e.g. the Global Fund Principal Recipients who are responsible for implementing their grants' PSM plans. These organizations should be approached in person to present the PSM Toolbox project and to discuss the possibilities. The PSM Toolbox should be seen as an ongoing activity, which is still growing due to the input from partners. At the moment it is still in the initial phase.

Promoting the project at relevant seminars such as the annual International Pharmaceutical Coordination meeting in November in Tunis, ICASA¹⁴ in December 2008 in Dakar and the

¹³ The Joint United Nations Program on HIV/AIDS (UNAIDS), <http://www.unaids.org>

¹⁴ International Conference on AIDS & STIs in Africa (ICASA), <http://www.icasadakar2008.org>

Southern African AIDS Conference¹⁵ in April 2009 were also mentioned. Promotional material like flyers and posters will need to be designed for this purpose in English and French. More CD-ROMs will also be required.

All organizations that contributed to the toolbox content should be requested to put the link to the PSM Toolbox website on their website. A reciprocal link will then be listed on the toolbox website, which also increases the Google search rating. Consultancy firms like CHD, HERA¹⁶ and the Euro Health Group¹⁷ could be requested to join as well.

Other options such as the e-drug resources page and FIP¹⁸ were suggested. Again, new contacts like FIP should be made face-to-face rather than via e-mail. Schools of Tropical Medicine such as the ones in Amsterdam¹⁹ and London²⁰ could also be interesting targets. Further suggestions include contacting ACAME²¹ who will have a meeting in Madagascar in November, the essential drugs department of PAHO²², and all WHO regional advisors. The latter will also serve as a way to find out about locally developed PSM tools that could be included. Finally, the International Association of Public Health Logisticians (IAPHL)²³ based in the USA was briefly mentioned. Their forum could be an interesting medium to promote the project.

Presentation of the PSM Toolbox during PSM related training courses will continue as usual. The demo video can be added as a new feature, especially when the voice over has been added.

According to Clearsite the website could and should rank better in the search engines when people do a search on a specific keyword. For example when people enter 'HIV/AIDS commodity security' the PSM Toolbox website should rank highly in the search engines. Now it is not showing on the first few pages. Clearsite will come up with a plan on how to achieve this. This is especially important to reach the target group, because they will probably enter these kinds of keywords in the search engines.

Definition of tool inclusion criteria

Since the start of this project no written tool inclusion criteria were developed. The decision to include a tool was taken in the working group based on some implicit criteria. In order to make the tool inclusion process more transparent the group was requested to suggest a minimum number of objective criteria that all tools, also the ones already included, need to comply with. Some of the suggestions made were:

1. A tool needs to be targeted at health professionals.
2. A tool needs to be relevant to procurement and supply management of health commodities.
3. A tool needs to be used in a certain number of sites (how many?) or at least been field tested in low and/or middle income countries.
4. If a tool was developed for 1 specific country it should be adaptable to other country situations.
5. A tool needs to be up to date.
6. For documents peer review e.g. by WHO is required.

¹⁵ Southern African AIDS Conference, <http://www.saaids.com>

¹⁶ Health Research for Action (HERA), <http://www.hera.eu>

¹⁷ Euro Health Group Consultants, <http://www.ehg.dk>

¹⁸ International Pharmaceutical Federation, <http://www.fip.org>

¹⁹ Royal Tropical Institute (KIT), <http://www.kit.nl>

²⁰ London School of Hygiene & Tropical Medicine, <http://www.lshtm.ac.uk>

²¹ Association des Centrales d'Achats Africaines des Médicaments Essentiels (ACAME), <http://www.acame.org>

²² Pan American Health Organization (PAHO), <http://www.paho.org>

²³ International Association of Public Health Logisticians (IAPHL), <http://my.ibpinitiative.org/public/Default.aspx?c=ca7f45ec-3b4a-400f-a055-b19ed8771066>

7. A tool can be translated by the developing organization in a relatively short amount of time.
8. There should not be a commercial aspect related to obtaining access to a tool.
9. There should not be a conflict of interest.

The working group will make a selection from the criteria mentioned above by e-mail after which the reduced list will be forwarded to other partner organizations for their consideration.

New tools, expansion into other diseases and possible translation of the PSM Toolbox

The working group members mentioned several tools that could be included once they become available or after review by the working group by e-mail. MSH mentioned the ART Dispensing tool, Rx Solutions and the e-TB manager software for patient case management and inventory management. The USAID | DELIVER PROJECT is working on an update of the ProQ software and a new anti-malarial quantification tool. Both MSH and the USAID | DELIVER PROJECT will send their new and updated tools to Clarisse Morris. UNDP also had several tools to contribute to the toolbox database such as a link to the UNDP procurement manual, the UNDP GFTAM operational manual, the BDP (Bureau of Development Policy) website, the UNDP procurement scheme, an interagency Pharmaceutical questionnaire and a PSM risk assessment tool. SIDATRAT is a patient monitoring tool used by UNDP Cuba. The information on UNDP tools is to be forwarded to the working group for consideration.

As mentioned on day 1 malaria and TB tools should be included to expand the toolbox beyond HIV/AIDS. The Expanded Program on Immunization (EPI) Department of Immunizations, Vaccines and Biologicals (IVB) of WHO in Geneva expressed interest in the PSM Toolbox shortly before the meeting. They are working on some PSM assessment tools. Inclusion of vaccine related tools is welcomed by the group. Once their tools are finalized they will be circulated to the working group for consideration.

Due to the importance of PAHO/AMRO and the growing number of Spanish language tools, it was decided to develop a Spanish PSM Toolbox for Latin America. PAHO/AMRO should be contacted for collaboration on this project in terms of obtaining tools in Spanish, translation activities and website administration.

Harmonization of PSM tools

The existence of many tools for the same PSM areas was the inspiration for this topic. Are all these tools completely different or can a generic tool be designed that will be useful in most situations? The participants mentioned that most tools are developed for a specific need and it will be difficult to harmonize them. Intellectual property rights are also a constraint to harmonization unlike for the M&E indicator harmonization project that is being undertaken by WHO/AMDS. However, when there is a perceived need for a particular tool that does not exist yet it can be developed by a collaboration of several partners, like the laboratory forecasting tool which is currently under development.

List of actions for the coming months

Please find a list of actions, responsible persons/organizations and proposed deadlines below.

No.	Action	Responsible	Outputs	Deadline
1	The website developer will investigate the large amount of website visits from the USA.	Clearsite	Explanation for the high number of visitors from the US.	Oct-08

2	Mention the Lusophone countries separately in regional overview	Clarisse Morris	More specific regional overview of website visits.	Oct-08
3	Ask MSH about availability of ART Dispensing tool	Clarisse Morris	Update availability info	Oct-08
4	Add difference between GPRM and Global Fund PRM	Clarisse Morris	Clarify information in PSM Toolbox	Oct-08
5	Suggest improved CD-ROM interface	João Teixeira	Improve user-friendliness of CD-ROM	Oct-08
6	Contact International Association of Public Health Logisticians	Claudia Allers, Clarisse Morris	Promote toolbox to IAPHL	Oct-08
7	Investigate which tool categories are accessed the most on the website	Clearsite	Info about users, useful for marketing	Nov-08
8	Correct information in the "cost" column of database	Clarisse Morris	Uniform descriptions in database	Nov-08
9	Contact Missionpharma on availability of their inventory management tool	Clarisse Morris	Update info in database	Nov-08
10	Design PSM cycle and put on PSM Toolbox homepage	Clarisse Morris, Clearsite	Clarify meaning of PSM to new users	Nov-08
11	Change "Category" to "PSM" area on homepage and next CD-ROM	Clarisse Morris, Clearsite	Clarify what is in the PSM Toolbox	Nov-08
12	Make a link between English and French website databases	Clearsite	Increase user-friendliness of search engines	Nov-08
13	Update tool information with currently available tools	Clarisse Morris	Update tool database	Nov-08
14	Send TB, malaria and laboratory tools to Clarisse Morris	Whole working group	Collect tools for expansion	Nov-08
15	Design promotion material (English/French) for conferences	Clarisse Morris, Vincent Habiyambere	Finalized promo material for conferences	Nov-08
16	Request all contributors to put the website link on their websites and make a links page on toolbox website	Clarisse Morris, Clearsite	PSM Toolbox is listed on partners' sites	Nov-08
17	Add tool details to the CD-ROM for tools available in other languages than English	Clarisse Morris	Increase user-friendliness of CD-ROM	Nov-08
18	Request known consultancy firms to put the website link on their websites	Clarisse Morris	PSM Toolbox listed on consultancy firms' sites	Nov-08
19	Contact e-drug resource center, FIP	Clarisse Morris	Promotion of PSM Toolbox to target group	Nov-08
20	Contact Schools of Tropical Medicine	Clarisse Morris, Hilbrand Haak	Promotion of PSM Toolbox to target group	Nov-08
21	Contact ACAME, PAHO, WHO regional offices for marketing purposes and regionally developed tools	Carinne Bruneton, Vincent Habiyambere	Promote toolbox to target group, collect regionally developed tools	Nov-08
22	Narrow down tool inclusion criteria	Whole working group	Short-list of tool inclusion criteria	Nov-08

23	Send updated and new tools to Clarisse Morris	Whole working group	Update database, add tool news topics	Nov-08
24	Contact WHO regional offices for translation of "when to use" information in toolbox CD-ROM	Vincent Habiyambere	Translation to increase user-friendliness of CD-ROM for non-Anglophone users	Dec-08
25	Add Quality Assurance category to database and redistribute tools	Clarisse Morris	Re-categorized database	Dec-08
26	Add "All" as an option for "Level of Use"	Clarisse Morris / Clearsite	Improve tool selection on website	Dec-08
27	Simplify the "Submit a tool" feature	Clearsite	Submit a tool directly via the website	Dec-08
28	Add disease related and commodity related tool specifications	Clarisse Morris / Clearsite	Classification of all tools according to disease and commodity type	Dec-08
29	Investigate required security measures to reduce spam on new tool comments feature	Clearsite	Input for WG decision on new comments feature	Dec-08
30	Approach UNAIDS, Global Fund and UNDP for buy in & toolbox dissemination purposes	Vincent Habiyambere	Collaboration with large organizations to promote toolbox on structural basis	Dec-08
31	Contact PAHO for development of Spanish PSM Toolbox	Vincent Habiyambere	Collaboration on development of Spanish toolbox	Dec-08
32	Prepare toolbox CD-ROM and website evaluation objectives and methodology	Clarisse Morris	PSM Toolbox evaluation set up	Jan-09
33	Think of a slogan which captures PSM	All contributors	Clarify meaning of PSM to new users	Jan-09
34	Add voice over to demo video. Website should be adjusted first following the action list and then the demos will be revised.	Clarisse Morris / Clearsite	Improve attractiveness of demo videos	Jan-09
35	Translate demo video into French	IDA Solutions	Translated demos for French website	Feb-09
36	Send vaccine tools to working group once finalized	Clarisse Morris	Evaluate vaccine tools for inclusion	TBD
37	Translate demo video into Spanish (once collaboration with PAHO has been established)	PAHO, independent translators	Translated demos for Spanish website	TBD

A date for the next meeting was not set. However, the PSM Toolbox project will be on the agenda at the next AMDS partner meeting early 2009.

Vincent Habiyambere closed the meeting by thanking the participants for their contributions. Clarisse Morris will write a draft meeting report for review by the participants.

Annex 1 PSM Toolbox meeting agenda and participants

Meeting Participants:

1. Merlijn Ackerstaff, Clearsite Multimedia Design, the Netherlands (*1st day only*).
2. Claudia Allers, Sr. Technical Advisor, USAID | DELIVER PROJECT, USA (*teleconference*)
3. Carinne Bruneton, Réseau Médicaments et Développement, France (*1st day only*)
4. Kyle Duarte, MSH, USA (*via teleconference*)
5. Rosalie Faniyo, Supply Chain Management Specialist, UNDP, Denmark.
6. Hilbrand Haak, PSM Consultant, CHD Consultants, the Netherlands. (*2nd day only*).
7. Vincent Habiyambere, Medical Officer, WHO/AMDS, Switzerland.
8. Kelly Hamblin, USAID | DELIVER PROJECT, USA (*via teleconference*)
9. Clarisse Morris, Technical Officer, IDA Solutions, the Netherlands.
10. Arin Speed, Electronic communications & tools manager, MSH, USA (*via teleconference*).
11. João Teixeira, ARV Logistics Advisor, SCMS, Mozambique (*via teleconference*).

Meeting Agenda

Thursday, 9 October 2008 *Evaluation of the PSM Toolbox website and CD-ROM*

	Programme	Chair
9:00	Welcome	Clarisse
9:05	Introductions	
9:15	Meeting objectives	Vincent
9.30	Project update	Clarisse
10:00	Evaluation of the PSM Toolbox CD-ROM <ul style="list-style-type: none"> • User-friendliness • Attractiveness of the lay-out • Recommendations 	Rosalie
11:00	Review content of PSM Toolbox CD-ROM (Excel sheets English and French)	João (English) & Carinne (French)
13:00	Lunch	
14:00	Evaluation of the PSM Toolbox website <ul style="list-style-type: none"> • User-friendliness • Functionalities • Discussion: usefulness of the forum • Recommendations 	Claudia & Kelly
15:00	Review contents of PSM Toolbox website (English and French)	Arin (English) & Carinne (French)
16:00	Multiple tools for the same PSM process; how can we help users in selecting the right tool for their situation?	Vincent
17:00	Close of meeting	

Friday, 10 October 2008 *Future plans for the PSM Toolbox website and CD-ROM*

Programme		Chair
9:00	One year after the launch of the PSM Toolbox project – what do the users think?	Clarisse
11:00	Marketing plan for the CD-ROM & the website	Clarisse
13:00	Lunch	
14:00	Definition of criteria for tool inclusion	Hilbrand
15:00	New tools, expansion into other diseases & possible translation of the PSM Toolbox	Clarisse
16:30	Discussion - Harmonization of PSM tools	Vincent
17:30	Closing remarks	Vincent + Clarisse