

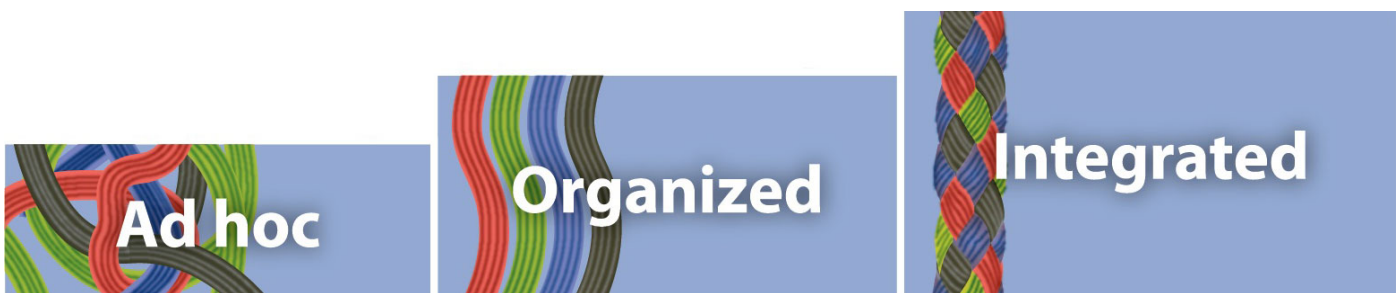


Supply Chain Compass: An Online Diagnostic and Planning Tool

Results for Health Supply Chain Sample Report

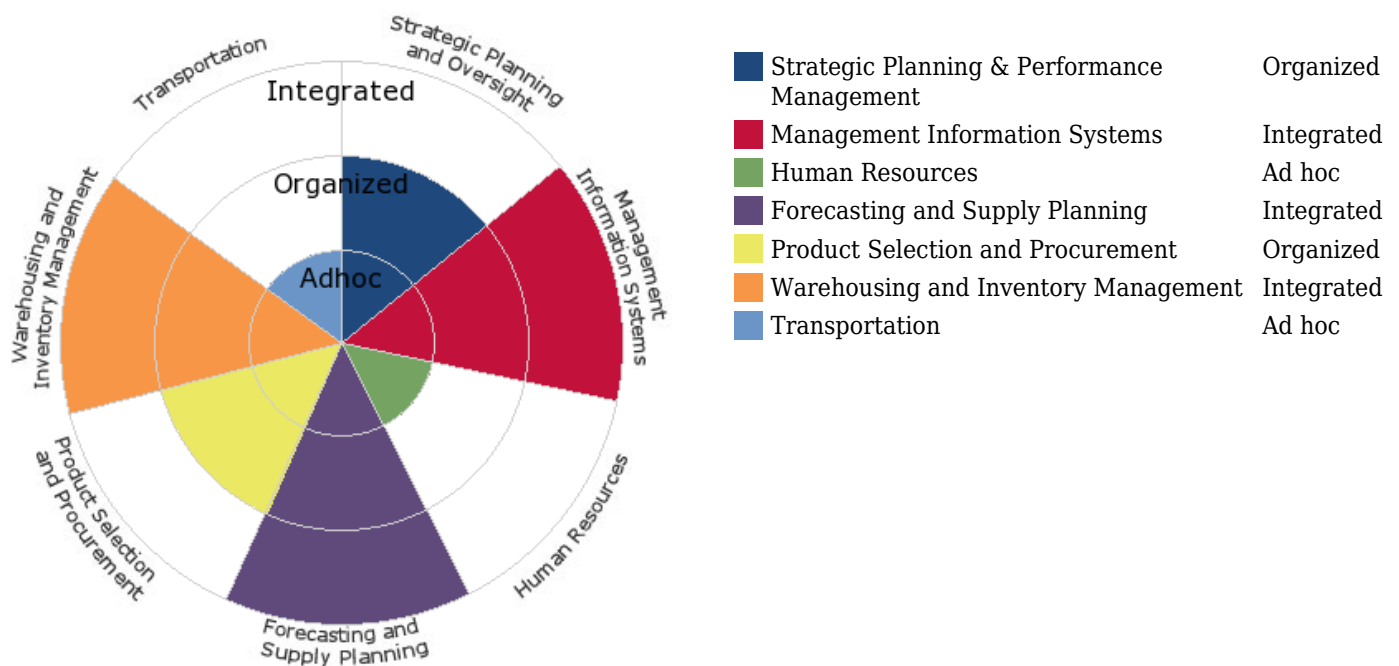
The Compass dashboard does NOT provide a comprehensive assessment your supply chain performance. It is a high-level, rapid diagnostic to help you learn about building integrated public health supply chains. Explore options for a more in-depth evaluation at www.jsi.com.

Using your answers to each question, your supply chain has been assigned a maturity phase (ad hoc, organized, or integrated). Each supply chain area has also been assigned a stage. This report provides you with activity-based interventions and resources, by supply chain area and stage, specifically selected to help advance your supply chain.



Your supply chain overall is in the organized phase.

This means standardized supply chain tools are defined and implemented, including LMIS; roles and procedures for basic logistics functions are clarified; and financial and human resources are mobilized to operate the system.



Strategic Planning & Performance Management



Strategic Planning & Performance Management is in the organized phase, which means that processes have been defined and implemented but they are not yet consistently available at all necessary locations, nor do they inform the activities of all key supply chain partners.

To improve your supply chain and move it from the organized to the integrated phase, consider using these interventions:

Guide Supply Chain Growth via a Strategy

- Secure and execute funding to implement supply chain strategy and design
- Develop advocacy approach to identify obstacles to implementing supply chain strategy
- Monitor and evaluate implementation of all key strategies and activities

Monitor Strategy with KPIs

- Institute sharing of KPIs across functional managers and partners to support joint strengthening efforts
- Automate manual performance monitoring tools to make key performance data visible to all key stakeholders

Optimize Network Structure and Business Processes

- Collect and analyze logistics data
- Use collected data to inform network optimization analysis
- Continuously advocate among supply chain partners for use of network analysis to routinely optimize network structure, including decisions to outsource logistics functions as appropriate

Secure Sufficient Supply Chain Budget

- Develop financial tracking tools to secure and execute funding to adequately fund all supply chain functions and departments at all levels

Review the following resources for guidance:

Guide Supply Chain Growth via a Strategy

- [Getting Products to People](#)
- [Planning and Implementing a Logistics System Design Activity](#)
- [Quick Reference to Logistics System Design](#)
- [Logistics Indicator Assessment Tool \(LIAT\)](#)
- [Logistics System Assessment Tool \(LSAT\)](#)
- [Assessment Tool for Laboratory Services and Supply Chains \(ATLAS\)](#)

Monitor Strategy with KPIs

- [Measuring Supply Chain Performance](#)
- [WHO Harmonized Monitoring and Evaluation Indicators for Procurement and Supply Management Systems](#)

Optimize Network Structure and Business Processes

- [Planning and Implementing a Logistics System Design Activity](#)
- [The Logistics Handbook](#)
- [Kenya: 2020 Supply Chain Modeling](#)
- [Predicting the Supply Chains of 2020.](#) (Tanzania)
- [LLamasoft](#)
- [Univ. of Pittsburgh/HERMES](#)
- [APICS](#)

Secure Sufficient Supply Chain Budget

- [Estimating the Global In-Country Supply Chain Costs of Meeting the MDGs by 2015](#)
- [Technical brief: Commercial Sector](#)

- Monitor and evaluate expenditure of these funds

[Performance-based Financing Offers Lessons for Public Health Supply Chains in Developing Countries](#)

- [Technical update: Performance-based Financing: Examples from Public Health Supply Chains in Developing Countries](#)
- LAC Infographic on Getting [Essential Medicines to Customers](#)
- [Follow the Money: Tracking Contraceptive Finances](#)

Build Supply Chain Coordinating Body

- Assess organizational and operating structure to determine obstacles to facilitating product availability
- Respond to obstacles as identified
- Confirm or update roles, responsibilities, and span of authority with decisionmakers as appropriate
- Provide training and/or coaching, as needed

Build Supply Chain Coordinating Body

- [CapacityPlus HR for Health Stakeholder Leadership Groups](#)
- [Strategic Pathway to Reproductive Health Commodity Security, The Policy Project](#)
- [Addressing the Health Workforce Crisis: a Toolkit for Health Professional Advocates, CapacityPlus](#)

Utilize Costing Data to Guide Design Decision-Making

- Automate manual performance and cost monitoring tools.
- Calculate return on investment and optimize resources based on cost and cost-benefit analysis

Utilize Costing Data to Guide Design Decision-Making

- [Measuring Supply Chain Costs—Collecting Essential Information for Public Health Decisionmaking](#)
- [Zambia ARV Supply Chain Costs: A Pilot of the Supply Chain Costing Tool](#)
- [Zimbabwe: Supply Chain Costing of Health Commodities](#)
- [Mozambique and Nigeria: Using Results from Supply Chain Costing](#)

Manage Outside Vendor and Logistics Service Providers

- Monitor and evaluate implementation of the vendor management process
- Train relevant personnel on vendor management process
- Identify and implement vendor management process with other vendors as appropriate
- Share performance results with vendors and agree on any actions needed to improve vendor performance

Manage Outside Vendor and Logistics Service Providers

- Private Sector Role in Health Supply Chains: Review of the Role and Potential for Private Sector [Engagement](#) in Developing Country Health Supply Chains (Dahlberg and MIT Zaragoza Paper)
- [Emerging Trends in Supply Chain Management: Outsourcing Public Health Logistics in Developing Countries](#)

Management Information Systems



Management Information Systems is in the integrated phase, which means that processes have been defined and implemented and are consistently available at all necessary locations, inform the activities of all key supply chain partners, and are routinely reviewed for continuous improvement.

To sustain the integrated phase, consider using these interventions:

Manage Data with Best-in-Class Tools

- Integrate logistics management information systems (LMIS) into other business processes (e.g., human resources financial, sales)
- Build interface that supports other donors' data

Report Complete, Timely, and Accurate Data

- Develop interface where all data from all supply chain programs are in one place
- Review and update tools for data collection and reporting for ordering and resupply and feedback
- Review and update format for displaying and utilizing data for decisionmaking

Monitor LMIS with KPIs

- Routinely review KPIs

Utilize LMIS Data for Decisionmaking

- Review and update process for using data to inform decisionmaking

Review the following resources for guidance:

Manage Data with Best-in-Class Tools

- [Computerizing Logistics Management Information Systems: A Program Manager's Guide](#)

Report Complete, Timely, and Accurate Data

- [Logistics Management Information Systems](#)

Monitor LMIS with KPIs

- [Measuring Supply Chain Performance](#)

Utilize LMIS Data for Decisionmaking

- [Supply Chain Analysis and Design](#)

Human Resources



Human Resources is in the ad hoc phase, which means that processes have not been defined and implemented.

To improve your supply chain and move it from the ad hoc to the organized phase, consider using these interventions:

Build Supply Chain Leadership

- Conduct stakeholder analysis to identify leaders, roles, responsibilities, and spans of authority
- Identify person for leader/champion
- Authorize person
- Provide orientation around role and advocacy principles and expectations

Develop Centralized Supply Chain Management Entity

- Conduct organizational assessment to identify where a supply chain management entity should reside and applicable roles, responsibilities, and span of authority
- Authorize with appropriate authorities
- Develop entity vision and mission
- Staff entity with qualified personnel
- Train entity staff to roles and responsibilities

Train Skilled Supply Chain Workers

- Map competency requirements by role to training
- Identify competency gaps in staff; map to training
- Define a training plan by role and

Review the following resources for guidance:

Build Supply Chain Leadership

- [Developing Leadership Program, MSH](#)
- [Center for Leadership and Management, MSH](#)
- [Global Leadership Resource Page, CapacityPlus](#)
- [Leadership Programs, Center for Creative Leadership](#)

Develop Centralized Supply Chain Management Entity

- [Logistics Management Units: What, Why, and How of Central Commodity Supply Chain Management](#)
- [Guidelines for Assessing the Management and Organizational Capacity of National Malaria Control Programs, Health Systems 20/20](#)
- [Functional Job Analysis: Guidelines for Task Analysis and Job Design, CapacityPlus](#)
- [Addressing the Health Workforce Crisis: a Toolkit for Health Professional Advocates, CapacityPlus](#)
- [McKinsey Organizational Health Index](#)
- [Organizational Design Forum](#)
- [Organizational Design Resource Page, Harvard Business ReviewCenter for Organizational Design](#)

Train Skilled Supply Chain Workers

- [CapacityPlus Training](#)
- [Supply Chain Online](#)
- [USAID | DELIVER PROJECT Pre-Service Training](#)
- [JSI e-Learning Courses K4Health Pre-Service](#)

administration process

[Roadmap](#)

Build Supply Chain Worker Performance

- Map competency requirements by role to performance expectations
- Identify competency gaps in staff
- Define a performance management plan by role and an administration process
- Authorize with appropriate authorities

Build Supply Chain Worker Performance

- [US Government Office of Personnel Management Performance Management Guidelines](#)
- [Career One Stop](#)
- [APICS Supply Chain Manager Competency Model](#)
- [Bio Supply Alliance Competency Model](#)
- [Bridgespan Performance Management Resource Page](#)
- [CapacityPlus Workforce Effectiveness Resource Page](#)

Incentivize Supply Chain Workers

- Identify supply chain goals or key challenges that can be addressed by instituting an incentive plan
- Define incentives (financial or non-financial) for supply chain to address the key behaviors to incentivize by level and function
- Map incentives to performance management expectations and plans
- Develop and implement process and standard operating procedures for managing incentives

Incentivize Supply Chain Workers

- [Performance-Based Financing: Examples from Public Health Supply Chains in Developing Countries](#)
- [Commercial Sector Performance-based Financing Offers Lessons for Public Health Supply Chains in Developing Countries](#)
- [Options Guide: Performance-Based Incentives to Strengthen Public Health Supply Chains-- Version 1](#)
- [Inventory of Performance-based Incentive Schemes](#)
- [Blog Post: Four Performance-based Financing Lessons Public Health Supply Chain Managers Can Learn from the Commercial Sector](#)

Staff Supply Chain Roles

- Conduct organizational assessment to identify required supply chain roles and responsibilities, and span of authority and required numbers
- Develop a workforce plan (positions, numbers of people, responsibilities) and process for managing
- Authorize with appropriate authorities

Staff Supply Chain Roles

- [Workforce Risk Evaluator, Booz Allen Hamilton](#)
- [iHRIS, CapacityPlus](#)
- [Workforce Planning Tool, Health Systems 20/20](#)

Forecasting and Supply Planning



Forecasting and Supply Planning is in the integrated phase, which means that processes have been defined and implemented and are consistently available at all necessary locations, inform the activities of all key supply chain partners, and are routinely reviewed for continuous improvement.

To sustain the integrated phase, consider using these interventions:

Build Forecasting and Supply Planning Management Processes

- Routinely review and update processes and tools
- Adapt existing tools or develop new tools, as needed

Monitor Forecasting and Procurement with KPIs

- Continuously review key performance indicators to ensure supply chain strategy is rectifying supply chain challenges
- Routinely review cost metrics and optimize cost efficiency

Utilize Multi-year Commodity Forecasts for Planning

- Empower supply chain champions to advocate for commodity funding
- Routinely share updated data with key partners to leverage sufficient funding

Improve Forecasting, Supply Planning, and Resupply Decisionmaking

- Train relevant staff in use of automated tools to routinely adjust and update quantifications to changing consumption patterns
- Routinely share updated data with key partners for effective supply planning
- Routinely review and strengthen forecasting and supply planning processes

Update Forecasts and Supply Plans Regularly

- Routinely review and strengthen forecasting and supply planning process

Review the following resources for guidance:

Build Forecasting and Supply Planning Management Processes

- [Pipeline](#)
- [PSM Toolbox](#)

Monitor Forecasting and Procurement with KPIs

- [Measuring Supply Chain Performance](#)
- [WHO Harmonized Monitoring and Evaluation Indicators for Procurement and Supply Management Systems](#)

Utilize Multi-year Commodity Forecasts for Planning

- [USAID | DELIVER PROJECT Quantification Guides](#)

Improve Forecasting, Supply Planning, and Resupply Decisionmaking

- [USAID | DELIVER PROJECT Quantification Guides](#)

Update Forecasts and Supply Plans Regularly

- [USAID | DELIVER PROJECT Quantification Guides](#)
- [Pipeline Software](#)

- [PSM Toolbox](#)

Product Selection and Procurement



Product Selection and Procurement is in the organized phase, which means that processes have been defined and implemented but they are not yet consistently available at all necessary locations, nor do they inform the activities of all key supply chain partners.

To improve your supply chain and move it from the organized to the integrated phase, consider using these interventions:

Build Sourcing and Procurement Processes

- Automate manual procurement tools and update standard operating procedures
- Expand interfacing capabilities to support wider visibility and use of data across logistics functions

Monitor Procurement Performance with KPIs

- Institute sharing of key performance indicators across functional managers and partners to support joint strengthening efforts
- Automate manual performance monitoring tools to make key performance data visible to all key stakeholders

Drive Coordination and Decisionmaking with Product List Managed by Committee

- Enforce terms of reference
- Develop a monitoring & evaluation component for the committee's activities, including status and use of the list of recognized, registered products
- Develop and advocate for financial and human resources to support committee activities

Institute Quality Control Measures

- Develop a monitoring & evaluation component for quality control

Use Internationally Recognized

Review the following resources for guidance:

Build Sourcing and Procurement Processes

Monitor Procurement Performance with KPIs

- [Procurement Performance Indicators Guide—Using Procurement Performance Indicators to Strengthen the Procurement Process for Public Health Commodities](#)
- [Procurement Performance Indicators Dashboard](#)
- [Key Performance Indicators Strengthen Procurement in Latin America](#)
- [Pharmaceutical Indicators - Version 1.0 - PAHO/WHO](#)

Drive Coordination and Decisionmaking with Product List Managed by Committee

- [WHO Medicines: essential medicines](#)
- [SIAPS: Essential Medicines Lists](#)

Institute Quality Control Measures

- [WHO good practices for pharmaceutical quality control laboratories](#)

Use Internationally Recognized

Specifications for Product Lines

- Develop a monitoring & evaluation component to ensure all technical specifications are complete, up-to-date, and consistently used for procurement

Plan Procurements Long-term and Use Flexible Procurement Mechanisms

- Advocate with procurement policymakers on the need and benefits of streamlining procurement for key health products
- Advocate for policy changes necessary for employing flexible procurement options, (such as long-term or multi-year agreements)
- Develop monitoring plan to monitor and evaluate procurement process

Specifications for Product Lines

- WHO Specifications for [Pharmaceutical Preparations](#)
- [World Bank: Section VII. Technical Specifications](#)

Plan Procurements Long-term and Use Flexible Procurement Mechanisms

- [Health Systems Assessment Approach: A How-To Manual: CHAPTER 10: PHARMACEUTICAL MANAGEMENT MODULE \(HS 2020\)](#)
- [Procurement Capacity Toolkit: Tools and Resources for Procurement of Reproductive Health Supplies, Version 2](#)
- [Lessons from Latin America and Caribbean for Improving Contraceptive Procurement](#)
- [Improving Contraceptive Procurement by Building a South-to-South Exchange Network in the Latin America and Caribbean Region](#)

Warehousing and Inventory Management



Warehousing and Inventory Management is in the integrated phase, which means that processes have been defined and implemented and are consistently available at all necessary locations, inform the activities of all key supply chain partners, and are routinely reviewed for continuous improvement.

To sustain the integrated phase, consider using these interventions:

Manage Warehouse and Inventory Management with IT Tools

- Routinely review and update processes and tools
- Adapt existing tools or develop new tools, as needed

Monitor Warehousing and Inventory Control with KPIs

- Continuously review key performance indicators to ensure supply chain strategy is rectifying supply chain challenges
- Routinely review cost metrics and optimize cost efficiency

Manage Warehouse Storage According to WHO Standards

- Routinely review processes

Manage Facility Storage According to WHO Standards

- Routinely review and update processes

Review the following resources for guidance:

Manage Warehouse and Inventory Management with IT Tools

- [Supply Chain Manager Software](#)
- [The Logistics Handbook](#)

Monitor Warehousing and Inventory Control with KPIs

- [Measuring Supply Chain Performance](#)
- [WHO Harmonized Monitoring and Evaluation Indicators for Procurement and Supply Management Systems](#)

Manage Warehouse Storage According to WHO Standards

- [Guidelines for the Proper Storage of Health Commodities \(wall chart, 24" x 36"\)](#)
- [Guidelines for the Storage of Essentials Medicines and Other Health Commodities](#)
- [The Logistics Handbook](#)
- [Guidelines for Warehousing Health Commodities](#)
- [Emerging Trends in Supply Chain Management: Outsourcing Public Health Logistics in Developing Countries](#)
- [Kenya: 2020 Supply Chain Modeling](#)

Manage Facility Storage According to WHO Standards

- [Guidelines for the Proper Storage of Health Commodities \(wall chart, 24" x 36"\)](#)
- [Guidelines for the Storage of Essentials Medicines and Other Health Commodities](#)
- [The Logistics Handbook](#)

- [Guidelines for Warehousing Health Commodities](#)

Resupply Stock According to Set Inventory Controls

- Routinely review and update supply chain network and inventory policies

Serve Clients According to Standard Treatment Guidelines

- Routinely review processes

Utilize Waste Management Processes

- Routinely review and update policies and processes

Resupply Stock According to Set Inventory Controls

- [The Logistics Handbook](#)
- [Planning and Implementing a Logistics System Design Activity](#)
- [Vendor-Managed Inventory](#)
- [Kenya: 2020 Supply Chain Modeling](#)
- [Tanzania: 2020 Supply Chain Modeling. Forecasting Demand from 2020-2024](#)

Serve Clients According to Standard Treatment Guidelines

- [WHO Model Formulary](#)

Utilize Waste Management Processes

- [USAID | DELIVER PROJECT Waste Management Resources](#)
- <http://www.healthcarewaste.org>
- [Preparation of National Health-Care Waste Management Plans in Sub-Saharan Countries \(WHO\)](#)

Transportation



Transportation is in the ad hoc phase, which means that processes have not been defined and implemented.

To improve your supply chain and move it from the ad hoc to the organized phase, consider using these interventions:

Manage Transportation with IT Tools

- Design manual or electronic transportation management tools (records ,reports)

Monitor Transportation with KPIs

- Identify relevant metrics and develop basic tools for performance monitoring
- Include cost monitoring metrics within performance monitoring tools

Meet Deliveries through Fleet Management

- Develop basic distribution design

Build Adequate Fleet Capacity and Record Keeping

- Develop guidance on transport operations and vehicle use, including job aids and standard operating procedures
- If private distribution is an option, develop service provider management guidance

Review the following resources for guidance:

Manage Transportation with IT Tools

- [Transport Management: A Self-Learning Guide for Local Transport Managers of Public Health Services](#)

Monitor Transportation with KPIs

- [Measuring Supply Chain Performance](#)
- [WHO Harmonized Monitoring and Evaluation Indicators for Procurement and Supply Management Systems](#)

Meet Deliveries through Fleet Management

- [The Logistics Handbook](#)
- [Transport Management: A Self-Learning Guide for Local Transport Managers of Public Health Services](#)
- [Measuring Supply Chain Performance](#)
- [Emerging Trends in Supply Chain Management: Outsourcing Public Health Logistics in Developing Countries](#)
- [LLamasoft Transportation Optimization](#)

Build Adequate Fleet Capacity and Record Keeping

- [Transport Management: A Self-Learning Guide for Local Transport Managers of Public Health Services](#)
- [Emerging Trends in Supply Chain Management: Outsourcing Public Health Logistics in Developing Countries](#)

For more information about supply chain integration, please visit <http://www.jsi.com>

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