USAID’s Health Finance and Governance (HFG) project helps to improve health in developing countries by expanding people’s access to health care. Led by Abt Associates, the project team works with partner countries to increase their domestic resources for health, manage those precious resources more effectively, and make wise purchasing decisions.
The Health Finance and Governance (HFG) Project works to address some of the greatest challenges facing health systems today. Drawing on the latest research, the project implements strategies to help countries increase their domestic resources for health, manage those precious resources more effectively, and make wise purchasing decisions. The project also assists countries in developing robust governance systems to ensure that financial investments for health achieve their intended results.

With activities in more than 40 countries, HFG collaborates with health stakeholders to protect families from catastrophic health care costs, expand access to priority services – such as maternal and child health care – and ensure equitable population coverage through:

- Improving financing by mobilizing domestic resources, reducing financial barriers, expanding health insurance, and implementing provider payment systems;
- Enhancing governance for better health system management and greater accountability and transparency;
- Improving management and operations systems to advance the delivery and effectiveness of health care, for example, through mobile money and public financial management; and
- Advancing techniques to measure progress in health systems performance, especially around universal health coverage.

The HFG project (2012-2018) is funded by the U.S. Agency for International Development (USAID) and is led by Abt Associates in collaboration with Avenir Health, Broad Branch Associates, Development Alternatives Inc., the Johns Hopkins Bloomberg School of Public Health, Results for Development Institute, RTI International, and Training Resources Group, Inc.

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To learn more, visit www.hfgproject.org
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I. INTRODUCTION AND DISSEMINATION OF HEALTH MANAGEMENT TOOLKIT, IN NATIONAL AND INTERNATIONAL PUBLIC EVENTS

1) Introduction

USAID/Peru has provided technical assistance to the health sector for over 50 years. As this is the final year of technical assistance to the health sector, they have scheduled an Exit Plan that has, amongst its activities, transferring those tools, methodologies, and guidelines of proven effectiveness that have been developed over the years by USAID projects, in coordination with the Ministry of Health (MOH).

During the past five years, USAID/Peru has worked and provided technical assistance to the MOH in the transfer, extension and scaling of strengthening to health systems to support decentralization at a regional/local level, to provide effective and efficient health services; providing technical assistance, mainly through three projects: USAID/Health Policy (HP); USAID/Healthy Municipalities and Communities (HMC) and USAID/Health Quality (HQ).

In this context, in order to facilitate management at different service levels and categories of services that comprise the health sector- and for regional and local authorities nationwide to know the methodologies, tools and processes developed by USAID- the USAID/Health Finance & Governance Project has been commissioned to update the tools previously developed jointly with the MOH and Regional Health Directorates, for them to be transferred to public institutions at national, regional and local levels.

For this, the USAID/HFG Project selected and updated 17 management tools, previously developed by these 3 projects, and packed them into a toolkit or toolkit. Thus, the management tools are organized to meet the needs of different user groups: policy makers, health services managers, local managers, implementers, health personnel, teachers, students, etc.
2) **Context**

Related to the above, the aim of HFG has been to systematize and transfer tools, methodologies and other products designed and promoted by USAID, in coordination with public institutions: MOH, DIRESA/GERESA, universities and other bodies at national, regional and local level, in order to institutionalize their use.

Within HFG’s work proposal, this intent is directly related to **Outcome 1**: "National and sub-national Institutions and stakeholders have access to a user-friendly toolkit to improve health service delivery systems under decentralization". Among its activities:

1.1. Design and develop the Toolkit (Toolkit), given management needs of institutions at national and regional levels, based on the tools developed during the execution of the following projects:
   - USAID/Health Policies
   - USAID/Healthy Municipalities and Communities
   - USAID/Health Quality

1.2. Make available to the MOH, Regional Governments, and other public institutions: universities, among others, the toolkit developed by HFG.

1.3. Dissemination of the tools in public forums, national and international.
3) Development of activities

3.1. Outcome 1.1: Design and development of the Toolkit:

After reviewing and analyzing the different tools developed throughout the intervention of USAID projects, and assessing the management needs of health care managers, 17 tools were updated in order to be included in the "Health Management" toolkit:

### Table 1: List of tools included in the Health Management Toolkit

<table>
<thead>
<tr>
<th>HEALTH MANAGEMENT: TOOLS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>COSTEA - Pharmaceuticals supply chain: Helps fund operations carried out throughout the pharmaceuticals supply chain.</td>
</tr>
<tr>
<td>2</td>
<td>PLANIFICA - Micronetworks: Facilitates the development of the institutional operating plan, linking it to the public budget systems.</td>
</tr>
<tr>
<td>3</td>
<td>COSTEA – Reduction of CCM: Helps to fund effective health interventions to reduce chronic child malnutrition</td>
</tr>
<tr>
<td>4</td>
<td>SECTORIZA - Territory: Helps to channel the responsibility in health between the health facility and the organized population</td>
</tr>
<tr>
<td>5</td>
<td>ASEGURA: Helps to estimate the financial requirement to provide coverage depending on policy scenarios</td>
</tr>
<tr>
<td>6</td>
<td>DETERMINA - Priorities: Records and counts the votes of the main social actors when determining a health priority.</td>
</tr>
<tr>
<td>7</td>
<td>ORGANIZA – Human Resources: Helps elaborating job profiles.</td>
</tr>
<tr>
<td>8</td>
<td>MEJORA - Services: Promotes the use of methodology for improving performance</td>
</tr>
</tbody>
</table>
| 9 | SIS GalenPlus*: Allows the implementation of the management integrated system of the health facility  
  • Informa – Medical Files: Generates medical records using SIS GalenPlus.  
  • Informa - Pharmacy: Enables pharmacy management using SIS GalenPlus.  
  • Informa – Scheduling and Appointments: Helps scheduling medical attention and user appointments using SIS GalenPlus. |
| 10 | DIAGNOSTICA - Information: Enables diagnosing information management. |
| 11 | DIAGNOSTICA – Human Resources: Enables diagnosing the implementation of the Human Resources Management System. |
| 12 | FORMULA - Projects: Supports the formulation of profiles of minor public investment projects. |
| 13 | EVALÚA - Networks: Facilitates the monitoring of health services network management. |
| 14 | VERIFICA – MR: For verifying the recording quality of medical records. |
| 15 | PROMOCIONA - Health: Supports families, communities and municipalities in health promotion and social development activities. |
| 16 | DIAGNOSTICA - Pharmaceuticals: Allows to know which problems affect the supply of pharmaceuticals in the micronetworks. |
| 17 | CALIFICA - HHFF: Verifies the existence of minimum conditions in health facilities, to deliver services in a properly manner. |
All these tools have been designed, validated, and implemented, and in many cases approved by national or regional health authorities. Based on the lessons learned during the implementation process, updating the tools has involved improving computer applications, making them friendlier, including their user manual and methodological guide.

At the same time, the web architecture where they would be hosted was designed and developed, including the following features in its structure:

- Tools organized in blocks and views to facilitate their selection and use.
- Articulated and interrelated operation, that facilitate the decision making processes.
- Freely accessible from a website and from any computer or mobile device.

3.2. **Outcome 1.2: Make the toolkit developed by the project available to the National Government (MOH), regional governments, and other public institutions: universities, among others.**

As a result of the coordination between USAID/Peru, the HFG Project and the San Fernando School of Medicine of the Universidad Nacional Mayor de San Marcos, the "Health Management" Toolkit has been transferred to the San Fernando School of Medicine, and is hosted on their website: http://gestionensalud.medicina.unmsm.edu.pe. Thus, any public or private institution, through the website of the School of Medicine, has free access to the use of these tools. At the same time, training sessions in the tools to were given to designated teachers.

Health Management was officially delivered to the Dean of the San Fernando School of Medicine, during the "XIV San Fernando Scientific Conferences", "XVII Conference on Health Research" and "XXIV Scientific student conferences of the San Fernando School of Medicine" from the National University of San Marcos, on September 09, 2015. The Head of the USAID Health and Education Office, the Dean of the School of Medicine, the Director of the Research Unit of the National University of San Marcos, and the technical team of the HFG Project attended.

Similarly, Health Management was also officially handed over to the Regional Government of Lima, in a ceremony at the San Juan Bautista Hospital in Huaral, on September 11, 2015, with the participation of the USAID representative, HFG’s technical team, the Governor of the Lima Region, the director of the Huaral Hospital and staff from DIRES Lima and Huaral Network.

In the same way, coordination with different public sector entities began so their websites are linked directly to the Health Management website; thus linking nine public institutions that consider these tools as an instrument that can transcend other public institutions nationwide:

1. National Civil Service Authority - SERVIR
2. Regional Government of Lima
3. Regional Government of San Martin
4. Regional Government of Ucayali
5. DIRES San Martín
6. DIRESA Ica
7. Regional Hospital of Ayacucho
8. Regional Hospital of Tumbes
9. San Juan Bautista Hospital of Huaral

On the other hand, the National Civil Service Authority - SERVIR, through the Human Resource Development Management, has proposed the dissemination of human resources related applications (ORGANIZA Human Resources and DIAGNOSTICA Human Resources) to public bodies at a national level for its implementation.
Regarding the transfer to the MOH, on behalf of the Senior Management, the Decentralization Office coordinated with the technical units of the MOH for a review and validation of the toolkit, and opinion about its usefulness. A validation workshop was carried out, with representatives of the Regional Health Directorate of Ica, the General Directorate of Human Resources Development Management, the Department of People's Health, the Institute of Health Services Management of the MOH, and managerial and operational personnel of the East Lima network; where HFG validated 5 tools: VERIFICA – MR, CALIFICA – HHFF, EVALUA – Networks, DIAGNOSTICA – Human Resources, and ORGANIZA – Human Resources. Technical meetings to validate PROMOCIONA - Health, DIAGNOSTICA - Pharmaceuticals, and FORMULA – Projects were also carried out.

Similarly, HFG coordinated dissemination meetings with officials from the MOH, IHSM, regional governments, and hospitals. Those included a meeting with the Regional Director and the DIRESA Cusco management team, where the web site and its possibilities of use were presented, and the Health Management tools were provided. Similar coordination with San Antonio Abad University of Cusco was made.

The toolkit has also been presented to the technical team of the Maria Auxiliadora Hospital of Lima, who showed interest mainly in the human resources management tools and SIS GalenPlus, after having visited the Hospital of Huaral to see it running. The HFG team has trained the team of the Office of Statistics and IT of the hospital in the use of the ORGANIZA-Human Resources tool, and has provided technical advice on the use of SISGalenPlus.

### 3.3. **Outcome 1.3: Dissemination of the tools in public, national and international forums.**

In order to publicize the tools and their value, to facilitate health services management, Health Management has been presented in national and international meetings and forums.

To facilitate its understanding and measure the degree of interest or response from the participants, the following instruments were developed:

a. "Catalog of Health Management Tools", containing the profile of each of the tools, using information sheets describing:
   - Tool Title
   - Purpose
   - Users
   - Methodology for its use
   - Tool contribution to management
   - Document type
   - Resources or documents included in the tool.

b. Opinion poll: "Interest in the Health Management toolkit", aimed at managers: regional directors, principals, hospital directors, and others. This survey, after reviewing the catalog, was aimed to meet the interest of regional health directors, MOH/institutes or hospitals directors, and other organizations, for each of the tools developed.
Thus, the toolkit has been presented in four in-country public meetings:

1.3.1. **XXI Intergovernmental Commission of Health - IGCH Ordinary.**

Twenty three regional health directors participated in the meeting, carried out in Cusco, from June 11 to 13 2015. The "Catalog of Health Management Tools" and the opinion poll "Interest on the Health Management toolkit" were delivered to health officials: regional directors, MOH general directors and institute heads; a total of 20 officers answered the survey: 17 regional health directors (DIRESA/DISA): Cajamarca, Madre de Dios, San Martin, Pasco, Loreto, Puno, Huanuco, Tumbes, Piura, Ica, Ucayali, Ancash, Lambayeque, Huancavelica, Moquegua, Tacna, Junin; 1 health director: DISA IV Lima East; 1 MOH General Director: General Directorate of Human Resources; 01 INEN representative: Planning Director.

The results showed that 100% of the officials that responded considered having the "Health Management" toolkit as "very useful"(Graph 1).

**Graph 1: Usefulness of having a toolkit that supports management**

As for the score of each of the tools (Graph No. 2), it was found that the tools that scored the highest ("very interested"), were:

- ORGANIZA Human Resources (85%)
- PROMOCIONA Health (85%)
- DIAGNOSTICA Human Resources (80%)
- MEJORA Services (80%)
- FORMULA Projects (80%)
Graph 2: Perceived usefulness of the tools

And among the tools that reached between 95% and 100% of "moderately interested" and "very interested" responses:

- MEJORA Services (100%)
- DIAGNOSTICA Human Resources (100%)
- ORGANIZA Human Resources (100%)
- PROMOCIONA Health (95%)
- FORMULA Projects (95%)

As for the interest on viewing "Health Management" from the institutional website (Diresa/Institute); 90% of officials expressed interest in having the toolkit on their website: "Very interested" (60%) and "Some interest" (30%). A smaller percentage expressed disinterest in having the tool. (Graph 3)
1.3.2. **VI International Nursing Congress.**

Carried out in Cusco, from June 25 to 27, 2015. The website where the tools are hosted, and their usability, was presented; and the "Catalog of Health Management Tools" and the opinion poll "Interest on the Health Management toolkit" were delivered to regional deans of the College of Nurses of Peru.

The survey was answered by a total of 9 Regional Deans of Nursing: Cusco, Cajamarca, Callao, Moquegua, Loreto, Ayacucho, Ica, Arequipa, Lima (metropolitan area), a vocal from Lima, and two representatives of the healthcare area of EsSalud Cusco. The results showed that 92% of respondents considered that having the support of Health Management would be very useful for their management (Graph 4).

**Graph 4: Usefulness of having a toolkit**

As for the interest on viewing Health Management from the website of their institution, 100% of the survey respondents expressed interest (Graph No. 5).
Regarding the interest in each of the tools, the ones that obtained higher rating ("very interested") were:

- ORGANIZA Human Resources (92%)
- PLANIFICA Micronetworks (83%)
- MEJORA Services (83%)
- DIAGNOSTICA Human Resources (83%)
- FORMULA Proyectos (83%)

Among the tools with "moderate interest" and "high interest" (Graph 6) are:

- ORGANIZA Human Resources (100%)
- FORMULA Projects (100%)
- PLANIFICA Micronetworks (91%)
  DIAGNOSTICA Human Resources (91%)
Graph 6: Perceived usefulness of the tools

On the other hand, unlike the answers given by the regional health directors, it can be noticed that, for some tools like INFORMA Pharmacy, INFORMA Clinical Record, and COSTEA CCM Reduction, between 50% and 33% of respondents did not reply if they were interested or not; this could be related to the tool not being associated with their roles.

1.3.3. As part of the transfer ceremony at the National University of San Marcos, the Health Management Toolkit was presented during the closing of the "XIV San Fernando Scientific Conference", the "XVII Conference on Health Research" and the "XXIV San Fernando Student Scientific Conference", and in the opening of the "International Course of Person-centered Medicine" of the San Fernando School of Medicine from the National University of San Marcos, on September 9, 2015. It was attended by the Head of USAID’s Health and Education Office, the Dean of the School of Medicine, the Director of the Research Unit of the National University of San Marcos, HFG Project’s technical team, and those attending the conference and the opening of the course.

1.3.4. The Toolkit was presented in a meeting-workshop, held on September 11, 2015 at the San Juan Bautista Hospital of Huaral, during the official delivery of Health Management to the Regional Government of Lima. This meeting was attended by the USAID representative, HFG’s technical team, the Governor of Lima Region, the director of the Huaral Hospital and staff of DIRES Lima.
and the Huaral Network. As a result of this meeting, the Regional Government of Lima published two videos on its website: (i) Reporting the reception of the Toolkit, and (ii) Implementation of SISGalenPlus, which has been operating in the Hospital of Huaral.

Also, as part of this delivery, and by request of DIRESA Lima, staff from the Huaral Network, the Huaral Hospital, and DIRESA Lima received training in the VERIFICA and ORGANIZA Human Resources tools. Training was also provided in the use of the DIAGNOSTICA Pharmaceuticals tool to representatives of the Executive Directorate of Pharmaceuticals, Supplies and Drugs, and the Directorate of Access and Use of Pharmaceuticals of DIRESA Lima. Training in the PROMOCIONA Health and SECTORIZA Territory was provided to the person in charge of Family and Housing of DIRESA Lima.

Health Management has also been presented in two international forums:

1.3.5. International Society for Pharmacoeconomics and Outcomes Research - ISPOR 5th Latin America Conference:

The International Society for Pharmacoeconomics and Outcomes Research (ISPOR), is an association that promotes the science of pharmacoeconomics (health economics) and outcomes research, contributing with useful information for decision makers within health field, to increase efficiency, effectiveness and equity of health care services to improve health.

As part of the 5th ISPOR Latin American Conference, on September 7 and 8 in Santiago de Chile, with more than 500 attendees from all Latin America, the United States and Canada, the results of the costs estimates of various diseases using the tool ASEGURA were presented, referring to the financial requirement for insurance coverage according to policy scenarios.

One of the estimates, "Cost of Advanced Colon Cancer in Health Facilities" was presented in the category 'presentation of research on podium', after the description and operation of the Health Management toolkit. The estimation based on updated costs from the Essential Plan of Insurance, costs per standard ingredient, was explained.

In another category of presentation, 'Exhibition and presentation of research posters', the project team presented the results of the application for 9 diseases:

- Cost of Metaxenic Illnesses in health facilities in Peru.
- Cost of non-complicated Diabetes Mellitus in health facilities in Peru.
- Cost of Tuberculosis in health facilities in Peru.
- Cost of prevalent Mental Illnesses in Peru.
- Cost of Hypertension in health facilities in Peru.
- Cost of Breast Cancer in health facilities in Peru.
- Cost of Prostate Cancer in health facilities in Peru.
- Cost of Cervical Cancer in health facilities in Peru.
- Cost of Advanced Gastric Cancer in health facilities in Peru.

In the space provided, four posters were presented on the second day, and five posters on the third day. Additionally, the attendees received the "Health Management Tools Catalogue" brochure.
1.3.6. **Global Maternal Newborn Health Conference 2015:**

The Health Management Toolkit was presented as part of the 2015 Global Maternal Newborn Health Conference, held from October 18 to 21st, 2015, with more than 1000 participants from 75 countries.

The presentation of Health Management was held in two categories:

1. Oral Presentation: "HFG Local Health System Strengthening Toolkit" directed to all attendees; where the purpose, importance and use of management tools were described; questions from the audience were answered. The Peruvian presentation was one of the two that represented Latin America in this conference.

2. Poster Session, where through a loop projection, visitors were shown the different tools. The presenters answered questions and the tools which captured greatest attention were developed more thoroughly.

Additionally, newsletters, "Health Management Tools Catalogue" brochures, and USB sticks containing the Toolkit were given.
II. RESULTS OF THE DISSEMINATION THROUGH THE "HEALTH MANAGEMENT" WEBSITE

From September 9, 2015, when the Health Management website was available to the public, to date (October 27), Health Management has received 1725 visits, with a total of 8896 page views. From these visits, visits from Peru represent 85.16% and 8.87% from other countries like United States, Mexico, China, Colombia, Chile, United Kingdom, Japan and Spain. From the total visits, 28.6% were new visitors (Graph No. 7).

Additionally, as mentioned above, Health Management is located on the website of the San Fernando School of Medicine, to which some public institutions have linked their respective websites to; this has contributed to greater dissemination.

Therefore, through these institutions (external links), Health Management is being distributed free of charge to the general public, which is reflected in the channel most used for visits -Referrals (70.7%) (Graph No. 8). SERVIR (66.56%), Lima Region (10.57%) and San Martin Region (5.57%) are the websites from where Health Management has been most often visited.
Health Management allows access to a survey, which has been answered by 113 users; the majority (83.2%) of whom believe that the tools are useful and the browsing is easy (59.3%) or somewhat easy (33.6%). And "knowing management tools" has been one of the main reasons (65.5%) for which they have accessed the Health Management website (Graph No. 9).

Regarding who the users of Health Management are, it can be observed that the highest percentage of users are health personnel (authorities, consultants, professional staff), most of them coming from the MOH or regional governments (Graph No. 10).
Graph 10: Management Visitors: Occupation and Institution of origin

From the users who responded to the survey, 97.3% said they would recommend access to Health Management (Graph 11)

Graph 11: Recommendation to access Health Management

- Yes: 97.30%
- No: 2.70%