Community Scorecard

Scorecard Facilitator Training
Session 1:
Welcome
## Agenda

### Session

**AM**
- Welcome
- Scorecard Overview
- Scorecard Standard Operating Procedures and the Facilitator Role
- Scorecard
- Practice: *Scorecard Review Meeting* Facilitation

**Lunch**

**PM**
- Practice: *Scorecard Review Meeting* Facilitation
- Scorecard Dashboard
- Action Plans and Data Collection & Submission
- Wrap Up
Session 2:
Scorecard Concept Overview
What IS a community scorecard?

A two-way and ongoing participatory tool for assessment, planning, and monitoring and evaluation of health services.
How does a scorecard work?

Scorecard is a four-phase process focused on continuous improvement.

1. Score the Scorecard
2. Interface and Develop an Action Plan
3. Implement Actions
4. Disseminate Data
How does a scorecard improve services?

- Communities can provide feedback directly to facilities.
- Facilities get a direct link to communities.
- Together they partner to identify and implement improvement actions.
How did we develop this scorecard?

[Insert the health goal that you seek to achieve with the scorecard]

Timeline:

1. Developed Scope
2. Designed Scorecard
3. Designed Process
4. Now in Training
<table>
<thead>
<tr>
<th>What is the scope of this scorecard?</th>
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<tbody>
<tr>
<td><strong>Area of focus:</strong></td>
</tr>
<tr>
<td><strong>Health goal:</strong></td>
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<tr>
<td><strong>Participating Health Facilities:</strong></td>
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<tr>
<td><strong>Community Populations:</strong></td>
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<tr>
<td><strong>Administrators:</strong></td>
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</tbody>
</table>
Session 3:
Scorecard Standard Operating Procedures and the Facilitator Role
What are the “ins and outs” of how the scorecard works?

The Standard Operating Procedures (SOP) appendix is in your Scorecard Toolkit.
Small Group Activity: 
*SOP Review*

**Instructions:**
1. Divide into 4 groups.
2. Each group is assigned a phase of the scorecard SOP (score, interface/develop action plan, implement action plan, disseminate data).
3. Study your assigned phase and prepare to teach the large group about it.

*The Standard Operating Procedures (SOP) appendix is in your Scorecard Toolkit.*
What is my job as a scorecard facilitator?

**Scorecard Facilitator:**
1. Facilitate Community Scorecard Review Meetings
2. Facilitate Healthcare Facility Provider Scorecard Review Meetings
   - Take notes and collect scores in both meetings using the scorecard.
3. Facilitate Scorecard Interface Meetings
   - Take notes and collect scores in the interface meeting and come to agreement on an aggregate score for the scorecard.
   - Facilitate the development of an action plan.
4. Share Scores and Action Plan with the Scorecard Manager
5. Follow up with Communities/Facilities on the Action Plans between Review Meetings
Session 4:
The Scorecard
What is in our scorecard?

Remember:

Area of focus: [Provide text explaining the area within the health system that the scorecard will focus on]

Health goal: [Insert health goal that you seek to achieve with the scorecard]
Small Group Activity: Scorecard Review

Instructions:
1. Divide into small groups of 4 to 5.
2. Explore the scorecard and discuss in your small group:
   • Why each indicator was selected
   • What do you think the indicator will measure
   • How do you think participants might respond to the indicator and interpret it
3. Be prepared to share your ideas with the large group.
Small Group Activity: Rating Scale Review

Instructions:
1. Divide into small groups of 4 to 5.
2. Examine the scorecard rating scale.
3. Practice rating several indicators:
   • Rate an indicator “acting” as a community member
   • Rate it again as a healthcare facility provider
4. Be prepared to share your ideas with the large group.
Session 5:
Practice: *Scorecard Review Meeting*
Facilitation
What is the Scorecard Review Meeting?

The Scorecard Review Meeting Guide is in the appendix of your Scorecard Toolkit.
Small Group Activity: Practice Facilitating the Review Meeting

Instructions:
1. Divide into small groups
2. Review the Scorecard Review Meeting Guide.
3. Each person in the group takes 5 minutes to practice facilitating the rest of the group in scoring the scorecard.

As you facilitate, remember to:
- Follow the guide
- Take notes
- Achieve consensus in the group around a score for each indicator
- Keep the discussion from focusing on blaming and finger pointing
- Stay focused on being a facilitator and do not get involved in the scoring
Session 6:
Practice: *Scorecard Interface*
*Meeting Facilitation*
What is the Scorecard Interface Meeting?

The Scorecard Interface Meeting Guide is in the appendix of your Scorecard Toolkit.
Small Group Activity: Practice Facilitating the Interface Meeting

Instructions:
1. Divide into small groups.
2. Review the Scorecard Interface Meeting Guide.
3. Each person in the group takes **5 minutes to practice** facilitating the rest of the group in scoring the scorecard.

As you facilitate, remember to:
- Follow the guide
- Take notes
- Achieve consensus in the group around a score for each indicator
- Keep the discussion from focusing on blaming and finger pointing
- Stay focused on being a facilitator and do not get involved in the scoring
Session 7:
Scorecard Dashboard
What is the role of the Dashboard?

1. Score the Scorecard
2. Interface and Develop an Action Plan
3. Implement Actions
4. Disseminate Data

INSERT SCREENSHOT OF YOUR DASHBOARD
Small Group Activity: Dashboard Analysis

Instructions:
1. Divide into small groups of 4 to 5.
2. Explore the dashboard, which has sample data in it.
3. As a group, answer the following:
   • What is the story each part of the dashboard is trying to tell?
   • What decisions can you make with this dashboard?
   • What stories does this sample data tell?
   • What actions could you take based on the sample data?
Small Group Activity: Dashboard Analysis Facilitation

Instructions:
1. Return to your small groups.
2. As if you were in a Scorecard Interface Meeting, each person in the group takes 5 minutes to practice facilitating the rest of the group in analyzing the dashboard.
3. Facilitate your small group in answering the following:
   • Do you see trends in the data?
   • What decisions might you take based on this data?
Session 8: Action Plans and Data Collection & Submission
What is the role of the action plan?

Scores ▶ Action ▶ Change!
What is the action plan template?
What tool do we use to collect and report scorecard and action plan data?
What is our data management plan?

Tools Used: [List the tool we use to collect data]

Data Access: [List who has access to scorecard data]

Dashboard Access: [List who has access to dashboard data]

Dissemination Tools: [List how the scorecard data / dashboard are shared]

Approval: [List who approves scorecard data / dashboard]
Session 9:  
Wrap Up & Next Steps
Wrap Up & Next Steps

Wrap Up

- How do you see the scorecard tool improving performance in your assigned communities?
- What is one thing you learned today that surprised you?
- Do you have any questions?

Next Steps

- [List here next steps related to the scorecard roll-out that are relevant to your group and deployment process]
Thank you!

Funded by the U.S. President’s Emergency Plan for AIDS Relief (PEPFAR) through the U.S. Agency for International Development (USAID), this publication was produced by Advancing Partners & Communities (APC), a cooperative agreement under agreement no.AID OAA A 12-00047, beginning October 1, 2012. The authors’ views expressed in this publication do not necessarily reflect the views of the U.S. Agency for International Development or the United States Government.