

# Performance Management Toolkit for Immunization Supply Chain Managers

July 14, 2016



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## Acknowledgements

This activity was commissioned by the People and Practices Priority (P&P) Working Group led by UNICEF under the GAVI Alliance supply chain strategy. The strategy promotes five fundamental building blocks for strengthening immunization supply chains; SC leadership/HR, data for management, better cold chain, system design and continuous improvement plans. The P&P Workstream is driving the activities related to SC leadership and HR with the ultimate goal of countries have strong immunisation supply chain leaders with adequate numbers of skilled, competent, accountable, motivated and empowered personnel at all levels of the health system to overcome existing and emerging immunisation supply challenges.

Acknowledgments and sincere thanks go out to all the members of the P&P working group who contributed to the development of this toolkit including Wendy Prosser, VillageReach; Andrew Brown, Executive Manager for PtD; Musonda Kasonde, Capacity Development Specialist, UNICEF SD; Kevin Etter, UPS, Bastiaan Remmelzwaal, Supply Chain Consultant, Hamadou Dicko, Senior Supply Chain Specialist, Gavi Alliance. Special thanks to Jean Blackstock, HR Consultant and author for her efficiency and effectiveness in pulling this document together.

Any omissions or mistakes in the text or resource citations are fully the responsibility of the author.

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## Purpose of the Toolkit

This toolkit forms part of the Country support package for Immunization Supply Chain Managers (iSCMs) as part of the implementation of the GAVI Alliance supply chain strategy and is designed to enable and support the embedding of effective people management practices while promoting an understanding of the importance of performance management.

While sharing key principles and practical tools to encourage best practice they also aim to strengthen performance management within supply chains in country.

The guidelines also reflect the aims of the People that Deliver (PtD) initiative which emphasizes the importance of human resources as a key driver of improved performance within supply chains. This can be achieved by focusing on activities that identify and enhance people performance including retention, supervision, mentoring and coaching.

*Performance management focuses on the effective management of people to achieve organizational goals and better serve its customers and assists in creating a work environment in which people are enabled to perform to the best of their abilities. It is an on-going process through which managers and their employees gain a shared understanding of work expectations and goals, exchange performance feedback, identify learning and development opportunities, and evaluate performance results.*

### Performance Management Model



## How to Use the Toolkit

- ❖ The purpose of the guidelines is to set out an approach to managing the performance of people which is practical, simple, systematic and robust.
- ❖ As a reference document it outlines all of the factors that should be considered and is not intended to be read from start to finish but rather the user will be able to select and focus on the particular interests and needs.
- ❖ The principles of performance management in all organizations are the same, but the context may differ. As such the case studies and resources in this document are tailored to the supply chain function regardless of whether it is small or large, and whether it is in the private sector, government or the development sector.
- ❖ Given that a large number of resources exist on performance management the purpose of the guidelines is not to reproduce or duplicate existing resources. Instead, the user will be guided to the resources and links provided to the relevant documentation.

## Intended Audiences

- ❖ National and Sub-National Immunization Supply Chain managers (iSCM's) and health service providers including clinicians, pharmacists and health workers with supply chain management responsibilities.
- ❖ National level leadership, senior supply chain management, administration and technical staff, and senior programme managers in Ministries of Health.
- ❖ Political leaders within the Ministries of Health, Finance and Planning with responsibility for development of the supply chain.
- ❖ HR functions at national level will also find the information and tools useful to help them in developing and embedding good HR practices and support systems throughout the government structure while creating an enabling environment for iSCM's.
- ❖ Country-level partners and technical assistance providers supporting supply chain strengthening or operations.
- ❖ Global donor organizations and technical agencies supporting health supply chain strengthening.

## The Importance of Performance Management

As a manager you are responsible for knowing if your employees are performing well. That means that they are conducting themselves consistent with the values of the organization and provide effective services to ensure that vaccines reach the people who need them and contribute to improved health. The key to performance management is having employees who know what they have to achieve and why.

### **My Role as a Supply Chain Manager**

Performance management is a term used to describe all the processes that ensure employees are working to the best of their ability. It is a continuous process which involves making sure that the performance of employees contributes goals of their team and the organization.

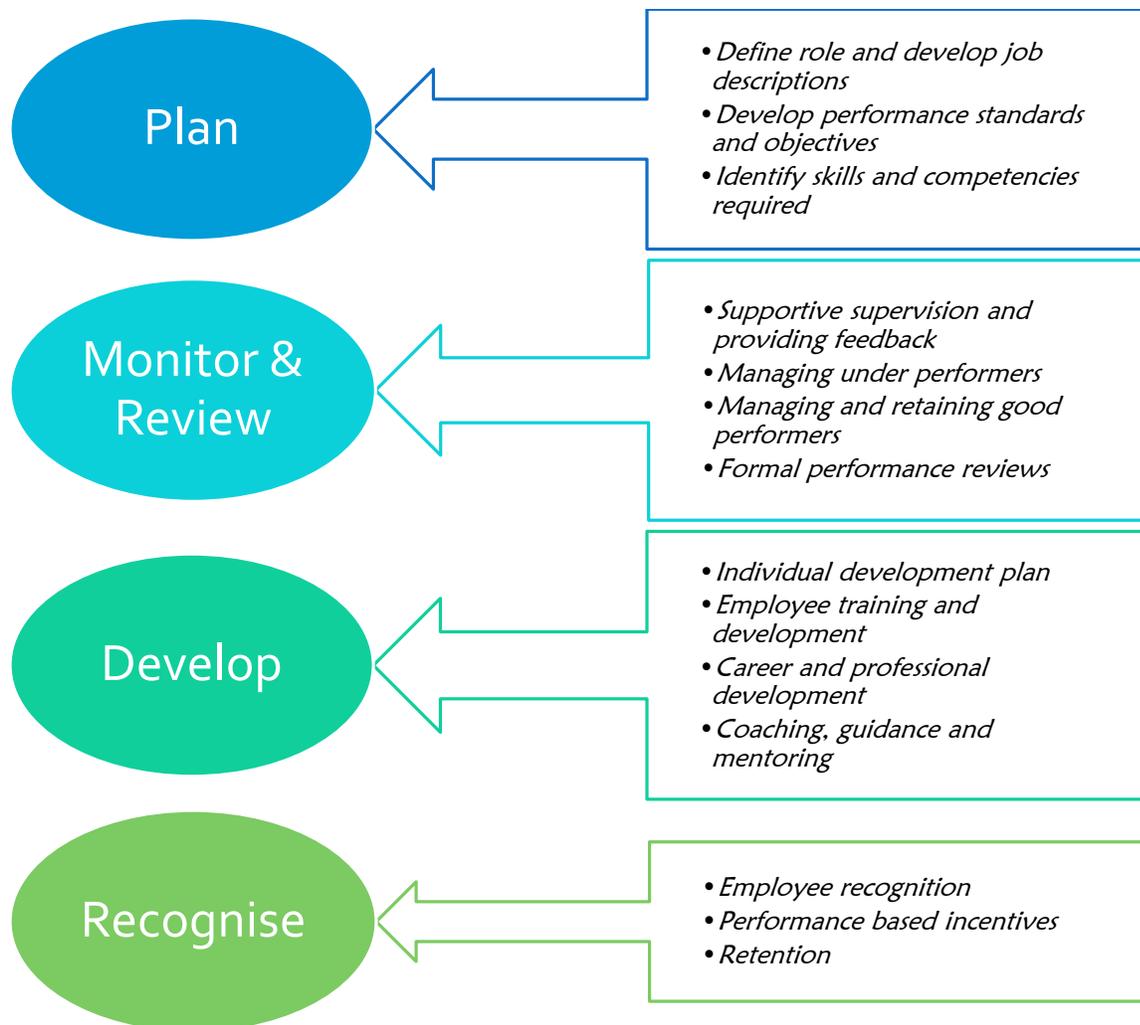
Good performance management helps everyone to know:

- What the supply chain function is trying to achieve
- Their roles in helping the immunization service and supply chain function achieve its goals
- The skills and competencies they need to undertake their roles and the standard of performance required
- How they can improve their performance and focus on developing their skills and competencies
- How are they performing
- When there are performance problems and what to do about them

Managing performance well will have a positive effect on how employees feel about their jobs and their ability to work to the right standards.

### **Structure of the Toolkit**

The framework is made up of 4 phases that represent the key components required for effective performance management. The guidelines describe the 4 phases in the model and the responding activities as illustrated below.



For each phase you will be provided with:

- Definition of the terms
- Principles - guidance on how to conduct the activities and recommended practices
- Tools and resources to assist – case studies, scenarios, workshop guides
- Further reading and references

## Phase One – Plan

### 1.1 Definition

The 'plan' phase is about preparing for the performance management process by developing job descriptions and agreeing standards of performance based on operating procedures within the supply chain. In addition to developing a work plan and agreeing objectives for the year. At this stage you should begin identifying the skills and competencies that will enable you to manage the performance of individuals within your team.

## 1.2 Principles and Processes



The planning phase is a collaborative effort involving you as the manager and employee and involves the key activities outlined below.

### 1.2.1 Define Role and Develop a Job Description

A job description is a document which defines a person's role and accountability and it is important to ensure it reflects the work that the employee should be doing. As a manager this is your first step in the performance management process as if you don't know what a job consists of, you cannot evaluate an employee's performance. The job should be documented based on the organizational mission and objectives, the department, and the job itself. For each employee, a good job description helps them to understand their duties and responsibilities and the relative importance of their duties.

To develop a job description, you should:

- Identify the values that should be reflected by all employees
- Establish the tasks or functions that need to be done
- Group the tasks into meaningful and challenging jobs
- Determine the experience, knowledge, skills and competencies required
- Consider any special working conditions or physical requirements

It is important that you are clear about the performance standards and expectations for all roles and these are some useful things to think about:

- How does the job help to achieve the standards and objectives?
- Who else the employee will need to work with to achieve the objectives?
- What responsibility and authority they will have for making decisions?
- What the key knowledge, skills and experience are to be successful?
- What is expected in terms of values and behaviours?

When you have done this you will have the information you need to write a job description.



The following documents, some developed specifically for the supply chain and provide useful tools and guidance.

- A. Sample of a standard template for supply chain related job descriptions. USAID | DELIVER, 2015  
[http://deliver.jsi.com/dlvr\\_content/images/imgtopics/imgorganizational/Templates\\_Job%20Description.pdf](http://deliver.jsi.com/dlvr_content/images/imgtopics/imgorganizational/Templates_Job%20Description.pdf)
- B. Sample job description for a regional transportation and warehouse manager. USAID | DELIVER PROJECT, 2015  
[http://deliver.jsi.com/dlvr\\_content/images/imgtopics/imgorganizational/Samples\\_Job%20Description.pdf](http://deliver.jsi.com/dlvr_content/images/imgtopics/imgorganizational/Samples_Job%20Description.pdf)
- C. Appendix 12 in the link below for a sample of job description. People that Deliver - Supply Chain Performance Improvement Program at the Central Medical Store in Namibia, SCMS, 2015  
[http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report\\_PtD%20Namibia\\_FINAL%20PDF.pdf](http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report_PtD%20Namibia_FINAL%20PDF.pdf)

### 1.2.2 Develop Performance Standards and Objectives

Work planning and objective setting is a fundamental part of a successful organization. Understanding what your team and department are required to deliver and translating these into work plans for each employee is a critical part of the process and provides the link between the overall goals of the supply chain and the individual's contribution to those goals. This ensures that everyone in the supply chain is working towards the same goals.

In this step you will establish a link between the job description and the overall objectives of the supply chain function by developing a work plan that outlines the tasks to be completed and the expected results or standards that will be used to evaluate performance. These can be developed by using standard

operating procedures such as receipt and storage of vaccines, packing and checking and transportation of vaccines. These are sometimes referred to as key performance indicators (KPI's).

In addition, for some positions you may wish to identify 1 or 2 key performance objectives for the year. Objectives are like the stepping stones towards the achievement of your supply chain goals and should be realistic targets. The choice of areas may be determined by the employee's desire to improve outcomes in a certain part of their job or by a need to emphasize a particular aspect of the job at this time. These are objectives that are critical to the overall success of the position. It may be that objectives require employees to develop existing skills, knowledge, or ways of working so that they can achieve the right results – as such, objective setting and personal development go hand-in-hand.

Ideally work plans, performance standards and objectives should not be set for employees but should be agreed with them. As their manager you should ensure that they are part of the process as it helps to reinforce their ownership and ultimately can help to motivate employees to perform. Once agreed the work plans, performance standards and objectives will form the basis of your conversation about performance.

You should also ensure that the objectives are SMART, **S**pecific, **M**easurable, **A**chievable, **R**ealistic and **T**ime bound. The following link provides some guidance.

<https://onedrive.live.com/redirect?page=view&resid=5E8E29EC753C46DA!3375&authkey=!AGIGo7-E38qNHfQ>

#### CASE STUDY - Use of performance agreements: World Vision

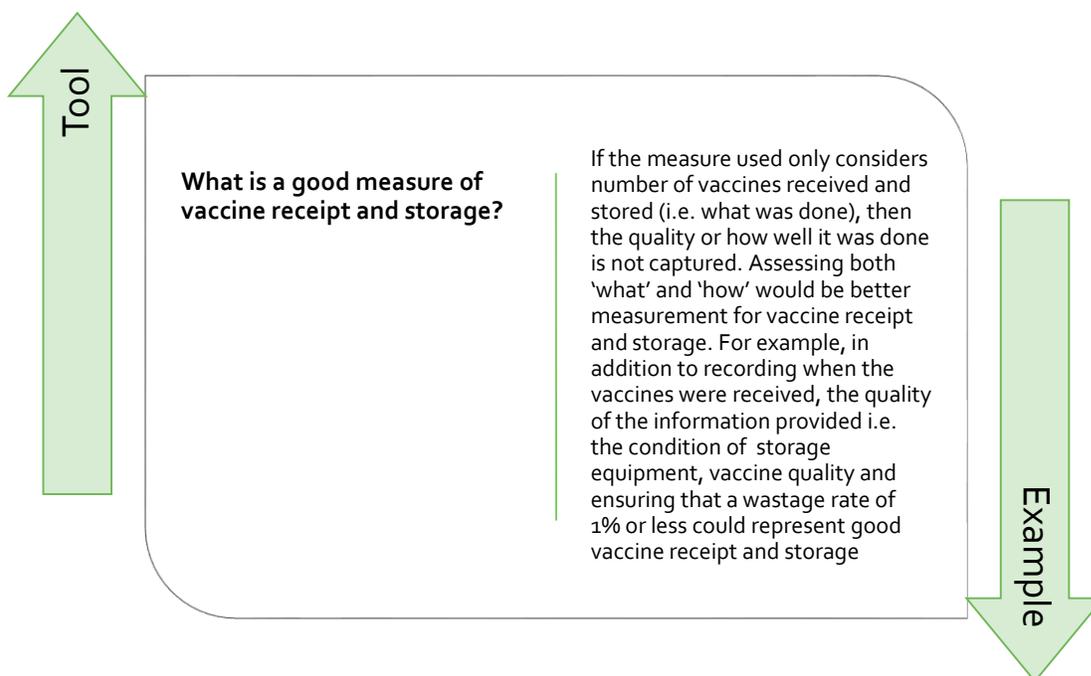
Performance Agreements (PAs) at World Vision are completed in November of each calendar year. This follows logically on from the Performance Review process that concludes in the previous month of October.

The PA process is essentially about looking forward, and provides an opportunity for managers and their employees to discuss and agree upon specific performance objectives for the coming fiscal year (October to September). It is advised that employee Performance Objectives be linked to managers' and/or the employee department's objectives. Objectives may also be linked to employee succession plans or department/programme future projects and initiatives.

The following process is recommended for establishing PA in World Vision: • Supervisor identifies key areas for objectives to be set. • Employee (often) submits draft objectives for the next year to Manager for review before the actual performance agreement discussion. • Employee and Manager discuss proposed objectives, timeframes and measures of outcomes, reach agreement and sign the PA.

In terms of the actual templates used throughout the process, a different PA form exists for staff, people leaders and executives. Extensive guidance is also made available to support the process, with tips, hints and best practice examples provided.

PA are usually officially reviewed in March, when the manager and employee can review progress against stated objectives and make adjustments as necessary. This review is intentionally placed at the half-way point of the year, allowing sufficient time for additional progress before the end of year review in October when the employee receives their overall performance rating.



- D. The guidelines and checklists below provide tips on how to write performance objectives goal setting for supervisors and managers. Developed by USAID DELIVER 2015.
- [http://deliver.jsi.com/dlvr\\_content/images/imgtopics/imgorganizational/D.%20Performance%20objectives\\_SS.doc](http://deliver.jsi.com/dlvr_content/images/imgtopics/imgorganizational/D.%20Performance%20objectives_SS.doc)
- [http://deliver.jsi.com/dlvr\\_content/images/imgtopics/imgorganizational/E.%20Goal%20Setting%20Tip%20Sheet\\_SS.docx.doc](http://deliver.jsi.com/dlvr_content/images/imgtopics/imgorganizational/E.%20Goal%20Setting%20Tip%20Sheet_SS.docx.doc)

### 1.2.3 Identify Skills and Competencies Required

As a manager it is important that you define the skills, behaviors, and attitudes that employees need to perform their roles effectively so that you can assess if they are qualified for the job and know what to measure.

To do this, many organizations use 'competencies.' These are the integrated knowledge, skills, judgment, and attributes that people need to perform a job effectively. By having a defined set of competencies for each position it shows employees the kind of behaviours the organization values, and which it requires to help achieve its objectives.

Defining which competencies are necessary for success in your organization can help you do the following:

- Ensure that your people demonstrate sufficient expertise.
- Recruit and select new employees more effectively.
- Evaluate performance more effectively.
- Identify skill and competency gaps more efficiently.
- Provide more customized training and professional development.

By creating a competency framework, you will have a standardized approach to performance that's clear and accessible to everyone. The framework outlines specifically what people need to do to be effective in their roles, and it clearly establishes how their roles relate to organizational goals and success.

A number of competency frameworks have been developed for all employees engaged in health supply chain management activities.

- E. Sample competencies for workers with supply chain duties from USAID | DELIVER PROJECT, 2015.

[http://deliver.jsi.com/dlvr\\_content/images/imgtopics/imgorganizational/C.%20Sample%20SCM%20Competencies\\_SS.doc](http://deliver.jsi.com/dlvr_content/images/imgtopics/imgorganizational/C.%20Sample%20SCM%20Competencies_SS.doc)

- F. Competency compendium and further guidance from Namibia developed by People that Deliver in 2014. It demonstrates how to create supply chain management competency frameworks for different cadres of supply chain workers. The compendium draws on 20 competency frameworks and related documents from a number of global organizations.

<http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/Feb%202014th%20FINAL%20PtD%20Public%20Health%20SCM%20Competency%20Compendium%20with%20ISBN%20and%20CC%20and%20publisher.pdf>

[http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/Final%20Competency%20Mapping%20Tech%20Report\\_PtD%20Namibia\\_PDF%206%2011%202014,%20%282%29.pdf](http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/Final%20Competency%20Mapping%20Tech%20Report_PtD%20Namibia_PDF%206%2011%202014,%20%282%29.pdf)

- G. Globally validated framework developed by People that Deliver in 2015. With 33 competency areas. The framework defines the skills, competencies and associated behaviours that are required for effective supply chain management. It can be used to map existing competencies with desired competencies at all levels of the system and inform a capacity development plan to address the gaps.

<http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/FINAL%20Validated%20SCM%20leadership%20%20management%20framework%2013th%20April%202015.pdf>

### 1.3 Tools and Resources

- H. Performance Management Toolkit, Step 1, Performance Planning. USAID | DELIVER PROJECT, 2015 This kit provides step-by-step guidance and resources for health supply chain workers with performance management responsibilities. The toolkit gives you practical advice and ready-to-use tools, including templates for writing job descriptions, tips for goal setting, guidance on supportive supervision, and sample forms for employee evaluation.

<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhscm/cbpmtmain/cbpmtperfcycle/cbpmtpcperplan>

### 1.4 Further Reading and References

CAPACITY PLUS. (2013). *Applying the HRH Action Framework to Develop Sustainable Excellence in the Health Supply Chain Workforce*. <http://www.capacityplus.org/technical-brief-12/>

MSH. (2014). *Systems for Improved Access to Pharmaceuticals and Services (SIAPS) Program. Promising practices in Supply Chain Management*. [http://siapsprogram.org/wp-content/uploads/2014/07/7\\_Human-Resources-final.pdf](http://siapsprogram.org/wp-content/uploads/2014/07/7_Human-Resources-final.pdf)

PEOPLE THAT DELIVER. (2014). *Competency Compendium for Health Supply Chain Management: A Reference for Health Supply Chains*. <http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/Feb%2014th%20FINAL%20PtD%20Public%20Health%20SCM%20Competency%20Compendium%20with%20SBN%20and%20CC%20and%20publisher.pdf>

PEOPLE THAT DELIVER. (2014). *Competency Compendium: Health Supply Chain Competency Mapping in Namibia*. [http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/Final%20Competency%20Mapping%20Tech%20Report\\_PtD%20Namibia\\_PDF%206%2011%202014%20%282%29.pdf](http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/Final%20Competency%20Mapping%20Tech%20Report_PtD%20Namibia_PDF%206%2011%202014%20%282%29.pdf)

PEOPLE THAT DELIVER. (2015). *Health Supply Chain Case Studies*. <http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/PtD%20Case%20Study%20FINAL%20LMI%20PTD.pdf>

PEOPLE THAT DELIVER. (2014). *Supply Chain Competency Framework for Managers & Leaders*. <http://www.peoplethatdeliver.org/sites/peoplethatdeliver.org/files/FINAL%20Validated%20SCM%20leadership%20%20management%20framework%2013th%20April%202015.pdf>

PEOPLE THAT DELIVER. (2015). *Supply Chain Performance Improvement Program at the Central Medical Store in Namibia*. [http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report\\_PtD%20Namibia\\_FINAL%20PDF.pdf](http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report_PtD%20Namibia_FINAL%20PDF.pdf)

USAID | DELIVER PROJECT. (2015). *Performance Management Toolkit*. <http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscm/cbpmtmain/cbpmtperfcycle/cbpmtpcperfplan>

FORBES.COM. (2015). *Smart Goals Can Sometimes Be Dumb*. <http://www.forbes.com/sites/markmurphy/2015/01/08/smart-goals-can-sometimes-be-dumb/#37d95acc142c>.

## Phase Two – Monitor and Review

### 2.1 Definition

The 'monitor and review' stage is about providing employees with day to day supervision, ongoing and regular feedback such that they receive the guidance and support necessary to perform. This is the most important part of the entire performance management process. At this stage you will also focus on managing different types of performance; underperformers and the motivation and retention of good performers both of which require a different management approach. Finally, you will conduct a performance review with employees which typically takes place annually.

## 2.2 Principles and Processes



### 2.2.1 Supportive Supervision and Feedback

Good supervision affects the performance of employees and contributes to a positive work environment and supervisory visits plus one to one discussions are an opportunity to recognize good practices and motivate your employees to enhance their performance. This is particular important for employees based at district or community level. Having established performance standards and objectives through supportive supervision you should regularly observe and monitor performance, recognize and reward positive performance, identify and correct problems, and provide feedback which will assist in improving the quality of service. This provides an opportunity for you to get a good sense of an employee's performance based on real examples and evidence such that weaknesses can be addressed immediately while providing guidance, support and training.

Providing day to day or ongoing feedback – both positive and negative will result in more effective communication with your employees and provides an opportunity for them to raise concerns. While most organizations require an annual performance review sometimes referred to as a performance appraisal to be done with all employees, effective people management is based on ongoing feedback, coaching and support throughout the year.

- A. The following guide of giving effective feedback provides further information on the process. USAID | DELIVER PROJECT, 2015.  
<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscm/cbpmtmain/cbpmtperfcycle/cbpmtperffeedback>
  
- B. The links below provide further guidance on Supervision and On-the-Job Training for Supply Chain Management at the Health Facility, a Summary of Supportive Supervision for the supply chain and Guidance on coaching for enhanced performance. USAID | DELIVER PROJECT, 2015.  
<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscm/cbpmtmain/cbpmtperfcycle/cbpmtperfmom>  
  
[http://deliver.jsi.com/dlvr\\_content/resources/allpubs/guidelines/OJT\\_SCMHealFaci.pdf](http://deliver.jsi.com/dlvr_content/resources/allpubs/guidelines/OJT_SCMHealFaci.pdf)  
  
<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscm/cbpmtmain/cbpmtperfcycle/cbpmtperfmom>

### 2.2.2 Managing Under Performers

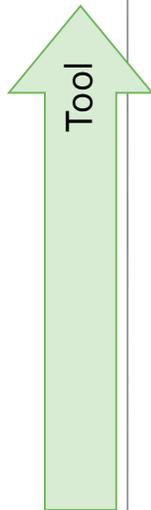
You should be aware that an employee's motivation and performance level can change over time and your role is therefore to know how your team is performing and to notice changes in performance and take action to ensure improvements. While this may be a daunting and challenging task it is important that you address problems as soon as possible.

Examples of performance issues include:

- Errors in work and unable to undertake the duties of the role
- Only does the bare minimum and is less willing to go the extra mile
- Is absent from work without cause or permission
- Missing deadlines and not completing duties to the required standard
- Poor timekeeping
- Has poor working relationships
- Less engagement with you as the supervisor

Not all under performance requires a formal approach and in most cases an informal discussion is all that is needed to improve performance. The following four step approach is recommended and provides a framework for talking to the employee about the need for improvement and to agree an action plan. It is important that you take notes of the meeting and provide the employee with a copy together with the performance improvement plan (PIP).

*Adapted from Oxfam GB, Guidelines on managing non performers.*



**1. Identify what form the poor performance is taking**

- Where 3 incidences have occurred this confirms a pattern
- Keep notes on different incidents
- Try to identify possible causes
- Be clear in what ways the individual's performance is poor

**2. Tell the person where and how their performance is poor**

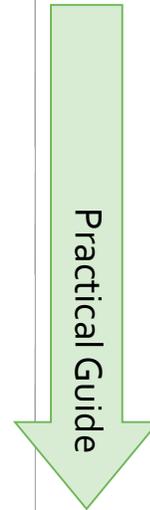
- Communicate in an objective, non-judgemental and straightforward manner.
- Avoid accusations, threats or justifying your own position
- **Be specific** - set the context, give examples
- **Describe the impact** - of their actions/behaviour on their work or other people around them
- **Keep it relevant** - to their work/role, focus comments on their behaviour, actions and results not on their character
- **Timely** - feedback should be given as soon as possible after the behaviour/incident has occurred

**3. Remain silent; wait for a response**

- This is difficult as the temptation is to add more explanation.
- You are inviting a response without knowing what sort of response you will get.
- The individual may deny, explain, defend or appease the situation.
- You need to deal with the response you get without getting into an argument, which will always be counter-productive.

**4. Deal with the underlying problem and set goals**

- Discuss the problems and decide together what to do
- Once you know what is causing the poor performance you are in a position to do something about it and plan a course of action to resolve it.
- New plans and performance targets can be agreed.



**CASE STUDY - Performance Improvement Plan Memorandum: International NGO**

Date: August 23, 2015

To: Paul Mwangi

From: Jane Rongai

Subject: Performance Expectations

During the past three months, I have spoken with you regarding my concern that you have not been performing your assigned work in accordance with what is expected of an Administrative Assistant. On June 4 and July 2, you were counseled about this unacceptable level of performance. My concern is without significant improvement your continuation as a successful employee in our department is in jeopardy. After our counseling session, I am disappointed this/here has not been any improvement.

We value you as an employee. This memo's intent is to make you fully aware of this situation and to assist you in improving your work performance. We believe with the proper tools you will be able to make the necessary changes to improve your performance, however, it is important that you realize the responsibility to improve is yours alone. Consequently, you are being placed on a Performance Improvement Plan (PIP).

You must demonstrate immediate improvement in the following areas, which are described in further detail in the attached Performance Improvement Plan:

**Time Management:** You have been consistently late in meeting your assigned deadlines to complete reports.

**Inappropriate Interpersonal Skills:** Your interaction with co-workers is often inappropriate and disruptive.

The behavior of rude interruptions, talking over someone else, talking and telling jokes during meetings is unacceptable. There are complaints of this unprofessional behavior in your interactions with others.

For the next six months, September 2015 to March 2016, you will be on a PIP. I will review your progress on meeting deadlines and using appropriate interpersonal skills, requiring improvement every two months.

During these meetings I will share with you whether or not you have demonstrated the kind of significant and sustained improvement the PIP requires.

Your objectives are:

**Time Management:** You will meet all deadlines set for all reports and/or discuss extensions to your deadlines as agreed to by your supervisor for the six months.

**Interpersonal Skills:** You will engage with your co-workers in a professional and productive manner. You will be expected to maintain professional relations with co-workers for the period September 2015 to March 2016 without any reports or demonstration of disruptive or inappropriate behavior in the workplace.

To assist you in reaching the performance objectives described in the PIP, you will meet with me on a bi-weekly basis to provide you coaching and feedback on your progress in the areas detailed above.

You will be required to attend the following training. We will continue to support you in attending these and other related training offerings you might identify: Effective Time Management Skills – September 13, 2015 and Collaboration in the Workplace – October 30, 2015.

Improvement must occur within six months and be sustained. If any portion of the improvement plan is not achieved during this time period, appropriate disciplinary action may occur. In addition, a decrease in performance after successfully completing the improvement plan may result in placing you back on a PIP or taking disciplinary appropriate action. As always, I am available for you to discuss the PIP any concerns you may have. A copy of this document will be placed in your personnel file.

Your signature acknowledges that you have been given the information and understand the content listed in this document.

Employee Signature \_\_\_\_\_

Date \_\_\_\_\_

Supervisor Signature \_\_\_\_\_

Date \_\_\_\_\_

An example of a performance improvement plan (PIP) can be found in the following link.

<https://onedrive.live.com/redirect?page=view&resid=5E8E29EC753C46DA!3379&authkey=!Al-svxxCmKrCCS8>

An outline of a workshop on managing under performers can be found in the following link and also provides some guidance on facilitating discussions with a view to identifying and resolving cultural resistance to managing under performance.

<https://onedrive.live.com/edir?page=view&resid=5E8E29EC753C46DA!3387&authkey=!ALQIJFphS6eYrmo>

Unfortunately, there may be occasions where you will need to take formal action and this should be done in accordance with the disciplinary policies established by the health service.

### **2.2.3 Managing Good (Consistently Well) Performers**

As a manager it can be easy to overlook the consistent and good performing employee, however if neglected these employees could become demotivated leading to underperformance or them leaving the organization. Part of your role is to praise and recognize and find ways in which to maintain their performance while identifying those employees who have the potential and desire to move to a higher level role or to manage more advanced work.

Ways to motivate includes:

- Having regular discussions and providing feedback on performance.
- Setting objectives that will challenge and stretch them.
- Providing training and development opportunities such as training courses, project work, mentoring and coaching.
- Working with employees to identify development needs, showing an interest in their career aspirations and facilitating opportunities where they may exist in the organization.
- Recognising day to day contributions as well as big achievements.

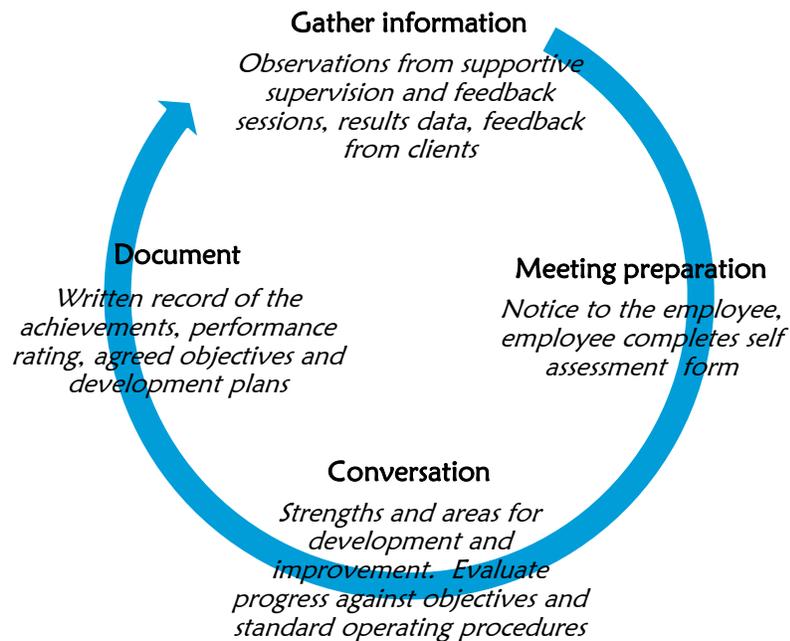
Further ideas on retaining employees can be found in Phase Four – Recognise.

- C. For practical ideas on motivating good performers see the link to the following publication: Retention of health care workers in low resource settings: Challenges and Responses – Capacity Project 2008.

[http://www.capacityproject.org/images/stories/files/techbrief\\_1.pdf](http://www.capacityproject.org/images/stories/files/techbrief_1.pdf)

### **2.2.4 Formal Performance Review (Annual Appraisal)**

The Performance Review is the formal process to look back at their progress through the previous year and document employee performance. During the annual performance review meeting the employee's final performance rating for the year should be agreed and you will jointly develop and agree to new objectives and expectations for the coming year. The process begins with gathering information in preparation for the meeting with employees and ends with presenting a written record of the outcome of the discussion as shown below.



During the performance review meeting you will:

- Summarize the work accomplished during the previous year based on the objectives set at the beginning of the performance period. This includes capturing key results, accomplishments and shortfalls for each objective.
- Document any challenges faced during the year and discuss unforeseen barriers to the achievement of objectives.
- Identify training and development needs.

You should ensure that the employee signs off on the form as this acknowledges their role in the process, but not necessarily agreement by the employee with the content of the evaluation. If the employee disagrees with any part of the performance review they must be given an opportunity to attach their comments. You should ensure that the employee receives a copy of the performance review form and the signed document is put on the employee's file.

- D. If your organization does not have a formal review process the link below provides useful tools and checklist that can be used. USAID | DELIVER PROJECT, 2015. This includes performance review rating forms for objectives and competencies and an employee self-assessment form.

<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscm/cbpmtmain/cbpmtperfcycle/cbpmtpcperappraisal>

## 2.3 Further Reading and References

CAPACITY PROJECT. (2008). *Retention of health care workers in low resource settings: Challenges and Responses*. [http://www.capacityproject.org/images/stories/files/techbrief\\_1.pdf](http://www.capacityproject.org/images/stories/files/techbrief_1.pdf)  
<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscom/cbpmtmain/cbpmtperfcycle/cbpmtpcperfmom>

CHS ALLIANCE (2011). *Core Humanitarian Competencies Guide*  
<http://www.corehumanitarianstandard.org/resources/chs-guidance-notes-and-indicators>

PATH. (2003). *Guidelines for Implementing Supportive Supervision: A step-by-step guide with tools to support immunization*.  
[http://www.path.org/vaccineresources/files/Guidelines\\_for\\_Supportive\\_Supervision.pdf](http://www.path.org/vaccineresources/files/Guidelines_for_Supportive_Supervision.pdf).

USAID | DELIVER PROJECT. (2015). *Performance Management Toolkit*.  
<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscom/cbpmtmain/cbpmtperfcycle/cbpmtpcperfeedback>

USAID | DELIVER PROJECT. (2015). *Supervision and On-the-Job Training for Supply Chain Management at the Health Facility*  
<http://deliver.jsi.com/dhome/whatwedo/capbuilding/cbhrscom/cbpmtmain/cbpmtperfcycle/cbpmtpcperfmom>

USAID | DELIVER PROJECT. (2015). *Supportive Supervision for the Supply Chain*  
[http://deliver.jsi.com/dlvr\\_content/resources/allpubs/guidelines/OJT\\_SCMHealFaci.pdf](http://deliver.jsi.com/dlvr_content/resources/allpubs/guidelines/OJT_SCMHealFaci.pdf)

## Phase Three – Develop

### 3.1 Definition

The 'develop' stage is about planning the learning and training needs of employees with a focus on the acquisition of knowledge and skills and the development of key competencies to be effective in their current roles. It also focuses on providing coaching, guidance and mentoring to support career and professional development aspirations.

## 3.2 Principles and Processes



Facilitating the training and development process for employees is a key role for managers and you are responsible for producing changes in skill levels that will in turn have a positive effect on the services provided with the supply chain. There are many reasons why training is required for employees and this includes:

- to foster growth and development
- to provide opportunities for employees to accept greater challenges
- to assist employees in contributing to the achievement of departmental and team goals
- to build employee self-confidence and commitment
- to change performance levels

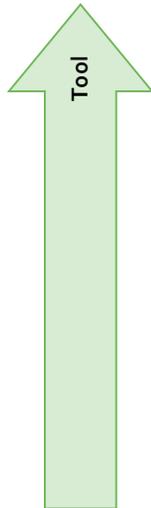
During the performance review meeting with employees you will have identified and discussed training and development needs related to the previous year's performance and your task is now to document these needs in further detail using an individual development plan and begin the process of implementing development solutions to enhance performance.

### 3.2.1 Individual Development Plans

An individual development plan (IDP) is a tool to assist employees in career and personal development. Its primary purpose is to help employees reach short and long-term career goals, as well as improve current job performance. For the purposes of these guidelines your immediate focus as a manager will be to improve current job performance and in the case of consistently performing employees to also facilitate the short term career and professional goals of your employees.

The (IDP) focuses on discussion and joint decisions by the employee and you on the specific developmental experiences necessary to support individual performance improvement, career development and organizational enhancement. Each IDP is uniquely tailored to the needs of the individual and the organization.

The following guide provides some tips on how to prepare an individual development plan.



Employees are usually the first to recognize the need for additional training which can arise from changes within the supply chain, such as the assignment of a new task and it is critical therefore that they play a major role in the development of the IDP.

The process of making an effective IDP first involves each employee asking himself the following questions:

- What direction is my organization going and what will the organization need from its employees in the future?
- What are my goals over the next five years?
- What are my greatest strengths and how can I build on them more effectively?
- Do I have any serious weaknesses that make it difficult to do my job or will prevent me from reaching my goals?

Developmental opportunities can take many forms, and a mix of training and experiential learning should be included on the IDP.

After you and the employee have agreed on the contents of the IDP, you should both sign it. In doing so the employee makes a commitment to follow through on the IDP and you as the manager to support and facilitate their training and development. The IDP should be reviewed and revised periodically to reflect the changing needs of the employee and the department.



An example of an IDP can be found in the following link.

<https://onedrive.live.com/redirect?page=view&resid=5E8E29EC753C46DA!3393&authkey=!ACvy8vChI9aqorY>

### 3.2.2 Employee Training and Development

Employee training and development is the responsibility of the organization and it is essential to continually enhance the capabilities of your supply chain team members. You have a specific responsibility to provide the right resources and an environment that supports the growth and development needs of the individual employee.

Employees cannot be expected to learn exclusively by observation and on-the-job training and it is therefore your responsibility to make an assessment of the type of training and development needed. Within your organization some core training programmes may already exist for your team and you should consult with the HR department or your head of department in order to find out what is available.

Ultimately employee training and development needs to suit your organization's context and job descriptions and when selecting employee training and development methods, it is important to take into account cost effective methods.

In addition to training courses there are many ways to provide employees with development opportunities as shown below.



Further guidance on these activities can be found in the link below.

<https://onedrive.live.com/edir?page=view&resid=5E8E29EC753C46DA!3381&authkey=!ACHVYxiHmxTWVAA>

For training and development activities specific to supply chain management see the links below.

- A. **Learning and Professional Training Opportunities for Public Health Commodity Managers (LAPTOP)**, offers a world of training opportunities in supply chain management. This joint initiative by the Reproductive Health Supplies Coalition and People that Deliver serves as an information clearinghouse on professional development opportunities for health commodity managers in developing countries. The database includes courses that focus on the development of practical skills that have the potential to result in more professional management of public sector supply chains and therefore in improved product availability in country. These include classroom-based courses and workshops, self-directed distance learning programs, and degree programs. <http://www.rhsupplies.org/activities-resources/tools/laptop/>
- B. **Initiating In-Country Pre-Service Training in Supply Chain Management for Health Commodities: Process Guide and Sample Curriculum Outline**, USAID | DELIVER PROJECT, 2010

This process guide and sample curriculum outline offers programs, governments, and projects interested in implementing PST for supply chain management of health commodities a general understanding of the process, stages, steps, and activities required for initiating a successful PST training program. [http://deliver.jsi.com/dlvr\\_content/resources/allpubs/guidelines/InitiatInCount\\_PreServeTrain.pdf](http://deliver.jsi.com/dlvr_content/resources/allpubs/guidelines/InitiatInCount_PreServeTrain.pdf)

#### CASE STUDY - Supply Chain Performance Improvement: Central Medical Store in Namibia

The purpose of the Supply Chain Performance Improvement Program (SCPI) was to build capacity in Central Medical Store (CMS) employees in ISO-accredited warehousing best practices through a modular, adaptable three-phased approach. The need for local, country-specific training programs is in high demand. In response to increasing requests, including a request from the Namibia Ministry of Health and Social Services (MOHSS), for a more country-specific, less resource intensive warehouse operations management (WOM) course, Supply Chain Management System (SCMS) employees designed the SCPI program.

The SCPI program was designed to be rolled out over six months in three phases: Initiation, Onsite Training and Post Review.

In the Onsite Training Phase, the SCPI program deploys the tailored training interventions with a focus on employee's ability to meet identified key performance indicators (KPIs). At the end of the implementation period (approximately six months), the Post-Review Phase occurs, when a team evaluates performance improvements against the baseline measures of the KPIs.

Namibia was the first country to pilot the SCPI program in its entirety. Implementing the SCPI program in Namibia was a natural complement to the Competency Mapping Exercise, which was conducted in January/February 2014.

At the conclusion of the Post-Review phase, the impact of SCPI was evident in the quantifiable improvement in the established key performance indicators (KPIs), as compared to baseline measurements

- C. Further information on this program can be found by accessing the following link.

[http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report\\_PtD%20Namibia\\_FINAL%20PDF.pdf](http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report_PtD%20Namibia_FINAL%20PDF.pdf)

### 3.2.3 Career and Professional Development

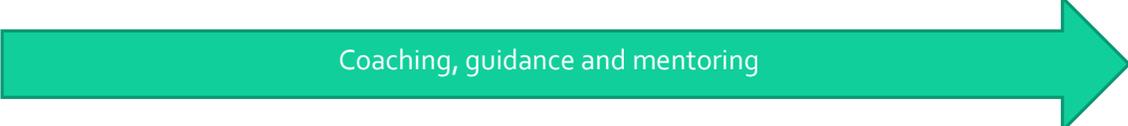
Supporting the career and professional development of employees in the supply chain means maintaining, improving and broadening their knowledge in the area. Supply chain management offers a wide variety of job options and you will play a key role in guiding employees as they pursue professional recognition and qualifications.

- D. The document entitled, Professionalization of Under-Recognised Health Worker Cadres: Capacity Plus, 2014 provides an overview of the approach developed to address the professionalization of under-recognised health workers such as supply chain employees.

<http://www.capacityplus.org/files/resources/under-recognized-cadres-overview.pdf>

Employees can contact the following organization to pursue professional accreditation.

**APICS** (American Production and Inventory Control Society), **CSCMP** (Council of Supply Chain Management Professionals), **CIPS** (Chartered Institute of Procurement and Supply), **CILT** (Chartered Institute of Logistics and Transport), **IAPHL** (International Association of Public Health Logisticians), **RESOLOG** (Francophone health supply chain professional society), **Technet 21** (Technical network for strengthening immunization services).



Coaching, guidance and mentoring

Finally, your role throughout the entire training and development process is that of the coach and/ or mentor. As coach you will demonstrate skills and to give the employee guidance, feedback, and reassurance while they practice the new skill. As an experienced manager you will mentor and provide guidance and advice to a junior employee.

#### CASE STUDY – How Tesco provides training and development for its employees: Tesco

Tesco is the largest British retailer and is also the world's third largest grocery retailer with outlets across Europe, USA and Asia. Tesco's primary aim is 'to serve the customer'. Keeping existing customers happy is important, as they are more likely to return.

As the company has grown, so has its workforce. From one man and a stall, Tesco now has approximately 280,000 employees in the UK and over 460,000 worldwide. To serve its widening markets it needs flexible and well-trained staff that can recognise the needs of the customer.

Tesco's employees work in a wide range of roles in both store and non-store functions, such as:

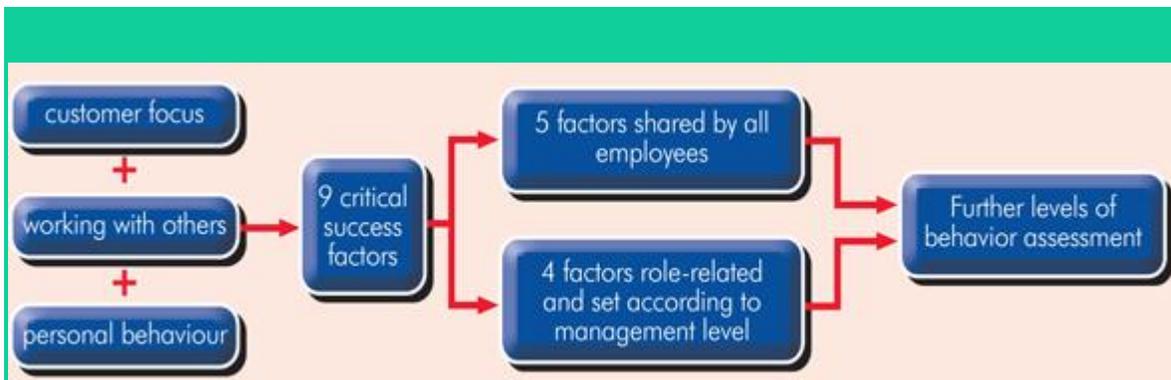
- Customer Assistants on the shop floor either directly assisting customers or preparing orders for delivery to customers who have ordered online
- Department Managers leading a team of Customer Assistants
- Warehouse employees who help catalogue and store clothing, food or brown goods in Tesco Distribution Centres or in stores
- Office-based staff working in a range of functions at Head Office, including Finance, Purchasing, Personnel or Marketing
- Logistics staff who plan and carry out the distribution of products to stores.

Tesco recognises that increasing knowledge, improving skills and job satisfaction of employees are all vital to the continued growth of the company.

#### Identifying training needs

Tesco employs people from a wide range of backgrounds and all employees have the opportunity to grow and develop. Tesco regularly evaluates the performance of its employees in order to anticipate any possible skills shortages. This helps managers and employees decide whether they have the correct knowledge, skills, understanding and resources to carry out their job effectively.

Through annual performance reviews and career discussions, employees are able to apply for training suited to their needs. For example, managers in stores, Distribution Centres and Head Office can spend a week in a store together, learning about each other's work. This makes each part of the Tesco operation more robust.



The Tesco Leadership Framework focuses on three key themes to guide appropriate behaviour in employees. These link to nine critical success factors, which break down further into various levels of assessment. This framework helps to identify those employees with the potential to be the 'best leaders of the future'.

Tesco sees it as a priority to develop leadership at every level in every part of the business.

In the last year over 2,900 managers, of which 85% were internal promotions, were appointed in the UK and thousands more employees promoted. One in every 10 Tesco employees takes part in development activities and as many as one in 30 are on its Options programme.

Before undertaking training and development, employees identify gaps in their knowledge and skills. The gaps identified are logged in an Individual/ Personal Development Plan. Employees and line managers decide how they will fill these gaps by training or development activities. Tesco's training and development programmes enable all employees to develop the skills they need to get on in their careers.

### Training

Tesco has a flexible and structured approach to training and development, which adapts to individual employee needs. This allows people identified as having the potential and desire to do a bigger or different role to take part in training to develop their skills and leadership capability.

Tesco offers employees both on-the-job training and off-the-job training. On-the-job training methods at Tesco include:

- shadowing a person already in the job shows the employee how to do it
- coaching a manager or designated colleague will help trainees work through problems and inspire them to find solutions
- mentoring a more experienced member of staff acts as an adviser
- job rotation or secondment the trainee has the opportunity of covering their target role, taking full responsibility on a temporary or limited basis.

For the employee, on-the-job training is directly relevant to their work, they get to know the people in their area and feel part of the team faster. On-the-job training also has several advantages for the company:

- It is cheaper than off-the-job training.
- Managers see progress and can help when problems arise to resolve them quickly.
- The employee is still working during training so is more productive.
- The employee puts learning into practice.

Off-the-job training is often more appropriate for training in specific new skills or for developing the individual, in areas such as team-building, communications (for example, making presentations), or organization and planning. It usually involves attending external courses run by professional training organizations or qualified Tesco training staff.

### 3.3 Further Reading and References

BUSINESS CASE STUDIES. <http://businesscasestudies.co.uk/case-studies/by-topic/people.html#axzz41YsOJH9c>

CAPACITY PLUS. (2014). *Professionalization of Under-Recognised Health Worker Cadres*. <http://www.capacityplus.org/files/resources/under-recognized-cadres-overview.pdf>

LAPTOP. *Learning and Professional Training Opportunities for Public Health Commodity Managers*. <http://www.rhsupplies.org/activities-resources/tools/laptop/>

PEOPLE THAT DELIVER (2015). *Namibia's Integrated Actions to Improve the Health Supply Chain Management Workforce*. [http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report\\_PtD%20Namibia\\_FINAL%20PDF.pdf](http://peoplethatdeliver.org/sites/peoplethatdeliver.org/files/SCPI%20Tech%20Report_PtD%20Namibia_FINAL%20PDF.pdf)

USAID | DELIVER PROJECT. (2010). *Initiating In-Country Pre-Service Training in Supply Chain Management for Health Commodities: Process Guide and Sample Curriculum Outline* [http://deliver.jsi.com/dlvr\\_content/resources/allpubs/guidelines/InitiatInCount\\_PreServeTrain.pdf](http://deliver.jsi.com/dlvr_content/resources/allpubs/guidelines/InitiatInCount_PreServeTrain.pdf)

## Stage Four – Recognise

### 4.1 Definition

The 'recognise' stage is about introducing performance based incentives that rewards employees when specified results are achieved. It also focuses on strategies for appreciating employees in non-financial ways and looks at ways to keep good performers.

## 4.2 Principles and Processes



### 4.2.1 Employee Recognition

Employee recognition is your opportunity to acknowledge an employee's or team's behaviour, efforts and accomplishments that support the organization's goals and values.

Employees can be recognized for both individual and group achievements and when recognizing a group of individuals, it is important for each person to be distinguished for their own contribution. Group recognition contributes to team building and informs the group that together, they are valuable to the organization.

Employees who feel appreciated:

- Often go above and beyond what is expected of them
- Are more productive and motivated
- Are more likely to stay with the organization

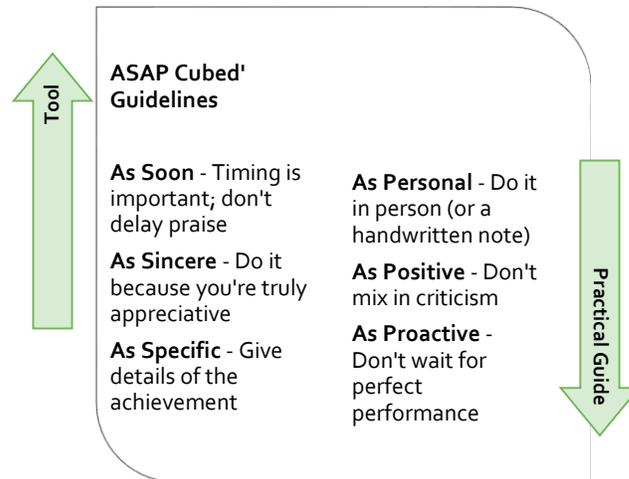
Recognition can be either formal or informal. Formal initiatives can be put in place on a weekly, monthly or yearly, based on length of service, personal accomplishments and team accomplishments, with informal recognition taking place when it is merited.

There are many ways to recognize employees however it must be designed to conform to your workplace culture and to the needs and interests of the individuals. The following link contains some informal employee recognition ideas that you can adapt based on your workplace culture and individuals.

[https://onedrive.live.com/redirect?page=view&resid=5E8E29EC753C46DA!3383&authkey=!AM6DSCw\\_pAUMGos](https://onedrive.live.com/redirect?page=view&resid=5E8E29EC753C46DA!3383&authkey=!AM6DSCw_pAUMGos)

**Keys for recognition and giving positive feedback to employees:**

*Adapted from Bob Nelson <http://www.nelson-motivation.com/>*



#### 4.2.2 Performance Based Incentives (PBI)

PBI is the process for introducing financial incentives to reward the attainment of results. Employees can receive performance payments at any point in the supply chain but only if specified results are achieved; so if there are no result, no performance payment is made. PBI therefore promotes hard work, innovation, accountability and results.

##### CASE STUDY – Motivation through performance incentives: Royal Bank of Scotland

The Royal Bank of Scotland Group (RBS) is one of the largest financial institutions in the world. It is a global business with a range of operations in Europe, North America and Asia Pacific. RBS has centres in thirteen European countries, sixteen North American states and eight major Asia Pacific cities. RBS creates the opportunity for its community of employees worldwide to share in its common goals and vision for the group. It does this by rewarding the people who contribute to its success through their commitment and hard work.

**Performance Management** - At RBS almost every role can be described in terms of specific job targets. This method of performance management allows managers to measure each individual's performance in a specific way and reward them accordingly. RBS employees will agree job objectives and targets with their line manager at the beginning of the year. Their performance is then measured and reported on during the year. At the end of the year they will have a performance review. Payments for results are an effective motivator for high performance.

Some jobs are paid according to the achievement of targeted results. This means that a bonus is paid if the employee achieves agreed targets for the job. For example, a corporate banker has responsibility for gaining a certain number of new business customers each year. If the target is achieved or exceeded she/he will get a bonus payment. Particularly challenging or difficult to achieve targets are known as 'stretch targets' and the reward for achieving these will be greater.

**Results Based Payments** - All employees share in RBS' success through its profit sharing scheme. If the company meets its overall profit targets, then all employees will receive a bonus worth 10% of their salary. On top of the profit-share bonus, as mentioned before, there is also the chance to earn an individual performance-related bonus when employees achieve or exceed their personal performance targets, for example, a project manager who delivers the project ahead of time and within budget. So in a year when the company does well and the individual performs well, the additional payments may be quite substantial.



## Case Study

Which of these two public sector facilities would you choose to work in?

<ul style="list-style-type: none"> <li>• Type of facility</li> <li>• Monthly salary</li> <li>• Rural allowance</li> <li>• Number of years you would have to work before getting study leave</li> <li>• Housing provided</li> <li>• Number of years before being eligible for promotion</li> <li>• Car allowance offered</li> <li>• The workplace culture and management style</li> <li>• Location</li> </ul>	<ul style="list-style-type: none"> <li>• Clinic</li> <li>• R120,000 per year</li> <li>• Additional R12,000 per year</li> <li>• 2 years</li> <li>• Subsidised accommodation, single room with shared kitchen and shared toilet</li> <li>• 2 years</li> <li>• None</li> <li>• The facility is formal and structured. The managers emphasize stability, following rules and keeping things running smoothly</li> <li>• Rural</li> </ul>	<ul style="list-style-type: none"> <li>• Hospital</li> <li>• R120,000 per year</li> <li>• None</li> <li>• 2 years</li> <li>• None</li> <li>• 2 years</li> <li>• None</li> <li>• The facility is personal and supportive. The managers emphasize teamwork, loyalty, and development to the full potential of employees</li> <li>• Urban</li> </ul>
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The following document have been developed specifically for the supply chain and provide useful tools and guidance.

- C. **Increasing access to health workers in remote and rural areas through improved retention. WHO, 2010.** WHO proposes sixteen evidence based recommendation on how to improve the recruitment and retention of health workers in underserved areas. It is aimed at policy makers however iSCM's may find some of ideas useful.

[http://www.who.int/hrh/retention/Executive\\_Summary\\_Recommendations\\_EN.pdf?ua=1](http://www.who.int/hrh/retention/Executive_Summary_Recommendations_EN.pdf?ua=1)

### 4.3 Further Reading and References

BLAAUW, D, E. ERASMUS, N. PAGAIYA, V. TANGCHAROENSATHEIN, K. MULLEI, S. MUDHUNE, C. GOODMAN, M. ENGLISH, AND M. LAGARDE. (2010). *Policy Interventions that Attract Nurses to Rural Areas: A Multicountry Discrete Choice Experiment*. Bulletin of the World Health Organization 88(5) 350-356

BUSINESS CASE STUDIES. <http://businesscasestudies.co.uk/case-studies/by-topic/people.html#axzz41YsOJH9c>

ABOUT MONEY. HEATH, S. *You Can Make Their Day: Five Tips for the Leader about Building Employee Motivation and Morale at Work*.

[http://humanresources.about.com/od/motivationsucces3/a/lead\\_motivation.htm](http://humanresources.about.com/od/motivationsucces3/a/lead_motivation.htm)

DR BOB NELSON.COM. *Keys for recognition and giving positive feedback to employees.*

<http://www.drbobnelson.com/resources/articles/>

USAID | DELIVER PROJECT. (2012). *Performance Based Incentives (PBI) to Strengthen Health Supply Chains.* [http://deliver.jsi.com/dlvr\\_content/resources/allpubs/guidelines/SC\\_Options\\_Guide.pdf](http://deliver.jsi.com/dlvr_content/resources/allpubs/guidelines/SC_Options_Guide.pdf)

USAID | DELIVER PROJECT. (2013). *Performance Based Incentives for Public Health Supply Chains: Training Toolkit.* [http://deliver.jsi.com/dlvr\\_content/resources/allpubs/guidelines/PerfBaseIncePHSC.pdf](http://deliver.jsi.com/dlvr_content/resources/allpubs/guidelines/PerfBaseIncePHSC.pdf)

WHO. (2010). *Increasing access to health workers in remote and rural areas through improved retention.*

[http://www.who.int/hrh/retention/Executive\\_Summary\\_Recommendations\\_EN.pdf?ua=1](http://www.who.int/hrh/retention/Executive_Summary_Recommendations_EN.pdf?ua=1)