

Primary Healthcare Performance Management Hard Skills Training Sample Terms of Reference for Trainers

JLN PHCPM Learning Collaborative

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For Universal Health Coverage



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For questions or inquiries about this tool or other JLN activities, please contact JLN at JLN@amref.org or the Aceso Global Primary Healthcare Performance Management Technical Facilitators at jlaforgia@acesoglobal.org or jroland@acesoglobal.org

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Preface

The Joint Learning Network for Universal Health Coverage (JLN) is an innovative global community of practitioners and policymakers from more than 44 countries who engage in practitioner-to-practitioner learning to co-develop and implement solutions to common challenges related to universal health coverage (UHC). Embracing a country-led, country-owned model, the JLN provides a unique implementation-focused platform for experience-based knowledge exchange and the co-development of practical resources to support health financing and service delivery reforms. These solutions equip countries with the 'how-to's of designing and implementing efficient, equitable, and sustainable healthcare systems.

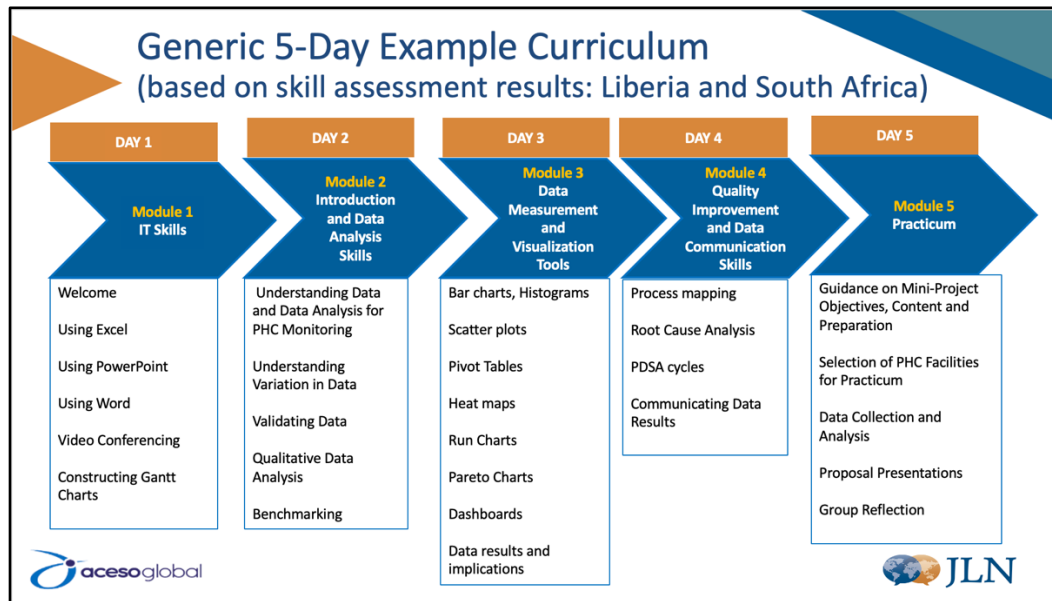
This template TOR is for hiring trainers to design and deliver the PHC hard-skills course. The template includes responsibilities, deliverables, and timelines.

TERMS OF REFERENCE (TOR)

Title: Trainer(s) for Hard-Skills Pilot Course on PHC Performance Management

Duration: [Start date] to [End date]

Background: The Primary Health Care (PHC) Performance Management Learning Collaborative aims to strengthen national capacity in applying data-driven methods (e.g., run charts, control charts, scorecards) to promote continuous quality improvement in primary care management. A pilot hard-skills course will be prepared, implemented, and evaluated.



Purpose of Consultancy: To engage expert Trainer(s) who will:

1. Design engaging course materials for all sessions;
2. Deliver training sessions;
3. Administer, collect, and upload knowledge checks/feedback surveys; and
4. Recommend refinements for scale-up.

Objectives: By the end of the consultancy, the Trainer(s) will have:

1. Developed a full set of course materials (Trainers' Guide/Manual, Participant workbook, slide decks).
2. Conducted [X] sessions, including breakout activities on run charts and other process-improvement tools.
3. Collected and analyzed participant feedback and learning assessments.
4. Produced a concise report with lessons learned and recommendations.

Scope of Work:

Design Phase

- Kick-off meeting (virtual) to refine objectives with [X];
- Curriculum development:
 - Detailed session plans (including timings, learning objectives, methodologies).
 - Slide decks with speaker notes.
 - Group exercises (breakout plans, instructions, materials).
 - Evaluation framework (pre/post tests, satisfaction survey).

Implementation Phase

- Facilitation of [number] sessions (X hours each), including:
 - Whole-group presentations.
 - Breakout activities on run-chart creation and interpretation.
 - Live coaching and immediate feedback.

Evaluation Phase

- Data collection: administer surveys, compile test scores.
- Final report: summary of findings, participant quotes, recommendations.

Deliverables:

Deliverable	Due Date
Inception Note	
Draft Course Materials	
Facilitators'/Trainers' Guides	
Finalized Course Package	
Pilot Delivery of Sessions	
Final Report	

Trainer Qualifications:

- Advanced degree in quality improvement, public health, adult education, or related field.
- ≥ 5 years' experience designing and delivering professional training (incl. breakout facilitation).
- Proven expertise in run charts, SPC tools, and health-system performance management.
- Strong facilitation skills with diverse audiences.

Indicative Timeline:

Phase	Activity	Dates	Effort (days)
Preparation	Inception & kick-off		1
Design	Materials development		7
Implementation	Training delivery		5
Evaluation	Reporting		2

Reporting & Management:

- Reports to: [X];
- Communications: weekly check-in calls;
- Quality assurance: all materials to be reviewed by [X], and pilot session dry-run scheduled one week prior.

Budget and Payment Schedule:

- 20% on Contract Signing;
- 30% on Delivery of Finalized Materials;
- 30% on Completion of Pilot Delivery; and
- 20% on Submission of Final Report.

Submission Requirements:

Respondents will submit:

1. Technical proposal;
2. Financial proposal; and
3. Individual CVs.

Annexes:

1. Annex A: Course Structure & Detailed Syllabus (to be inserted)
2. Annex B: Session Plan Template (to be inserted)
3. Annex C: Participant Pre- and Post-Test Instruments (to be inserted)