



HEALTH SUPPLY CHAIN

Management and Leadership Tips



PSA

THE SUPPLY CHAIN CAPACITY DEVELOPMENT COMPANY

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Contents

Foreword	1
Selecting	2
Specifying.....	3
Special Cases.....	4
Forecasting	5
Costing.....	6
Relating.....	7
Tendering.....	8
Contracting	9
Monitoring.....	10
Importing	11
Donating	12
Preparing for Emergencies.....	13
Manufacturing	14
Repacking	15
Storing	16
Supplying	17
Transporting	18
Disposing	19
Dispensing	20
Using.....	21
Planning.....	22

Deciding.....	23
Partnering.....	24
Teamworking.....	25
Resourcing.....	26
Recruiting.....	27
Training.....	28
Supervising.....	29
Quality Assuring.....	30
Reducing Risks.....	31
Sustaining.....	32
Using Information.....	33
Outsourcing.....	34
Literacy and Numeracy.....	35
Using Technology.....	36
Communicating.....	37
Cultural Awareness.....	38
Problem Solving.....	39
Negotiating.....	40
Managing Time.....	41
Acting Ethically.....	42
Learning.....	43
Leading.....	44
Managing Stress.....	45
Regulating.....	46
Leadership Development Plan.....	47

Foreword by Pamela (Ohonde) Steele Founder and CEO



The purpose of this guide is to give you some practical ideas, tips and suggestions to help you do your job better.

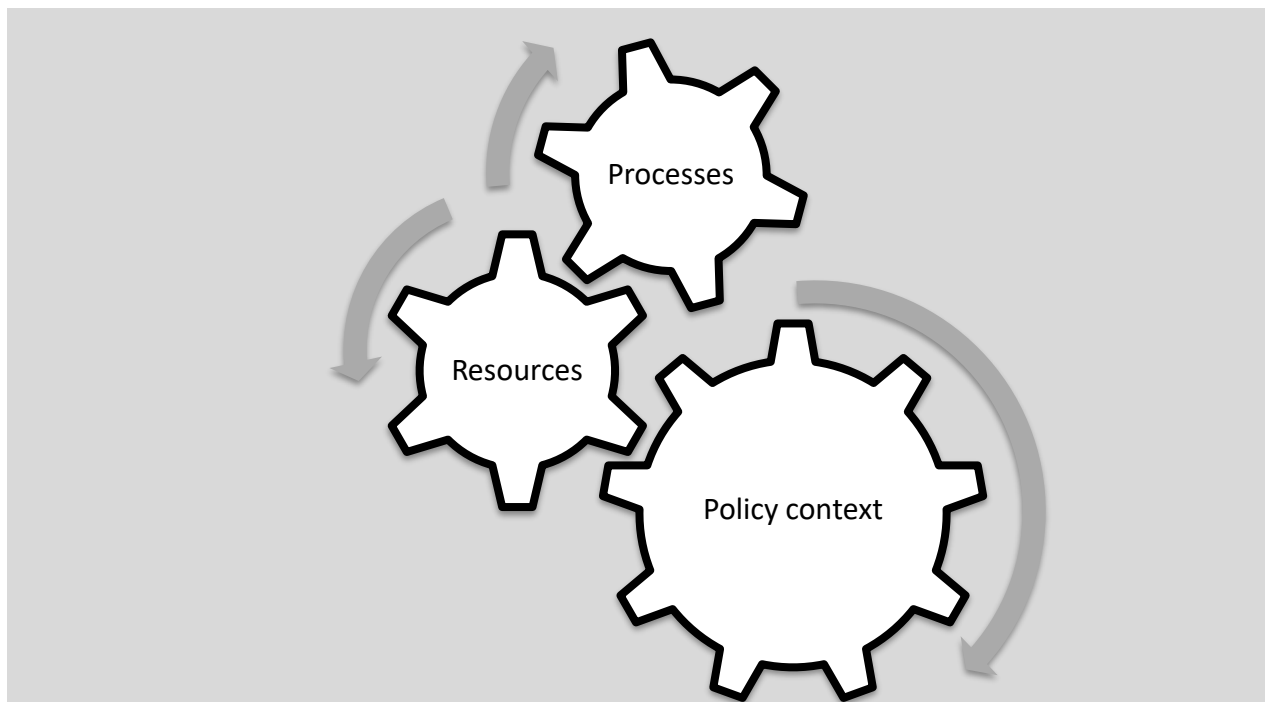
These tips cover forty-five technical, management and leadership competencies assessed by the Health Supply Chain Leadership Questionnaire (HSC-LQ) that PSA created to help build capacity in the health supply chain in developing countries.

The ideas, tips and suggestions cover key competencies in the PtD Health Supply Chain Competency Framework for Managers and Leaders.

They are based on advice from health and humanitarian supply chain practitioners and experts, analysis of key HSC publications and best practice guidelines, and the wider literature on management and leadership competencies.

I hope you find the ideas, tips and suggestions helpful, and I encourage you to take advantage of the learning and development our training programmes provide.

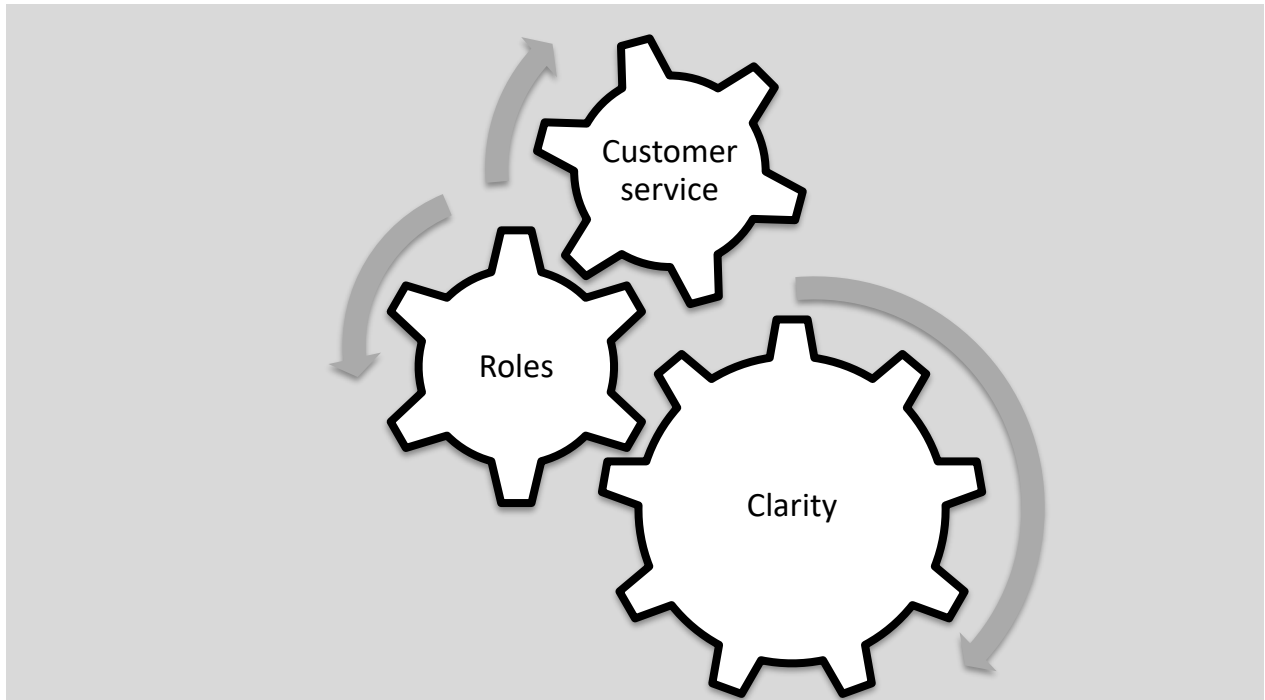
A handwritten signature in black ink, appearing to read 'P Steele'.



3 Tips for **Selecting**

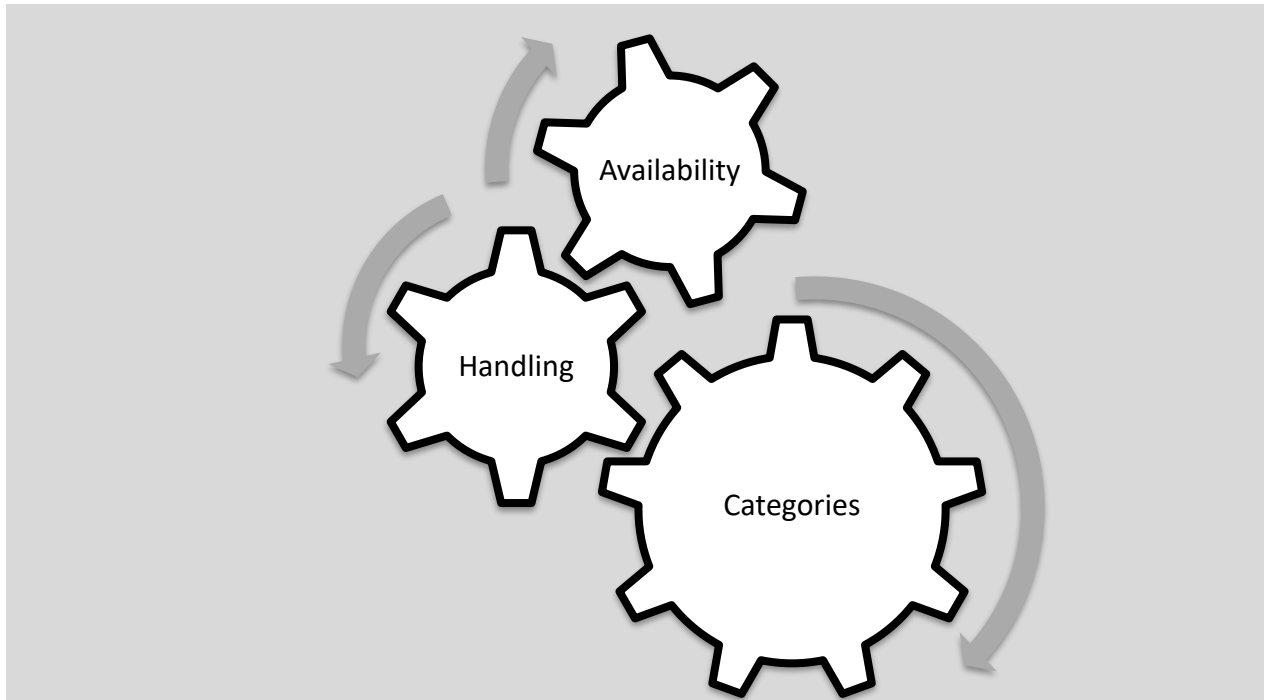
1. **Policy context.** Develop and share your understanding of the national policy context with employees and stakeholders--for example, the national medicines policy, committees, treatment guidelines, essential medicines list.
2. **Resources.** Ensure staff are well-informed about the key knowledge resources¹ that are available to help select the right products following national guidelines.
3. **Processes.** Follow correct procedures to change national medicine and equipment lists and alter treatment guidelines.

¹ National Medicines Policy, Drug and Therapeutics Committee, Standard Treatment Guidelines, WHO Essential Medicines List, Example Essential Medicines Lists, Rational Use of Medicines



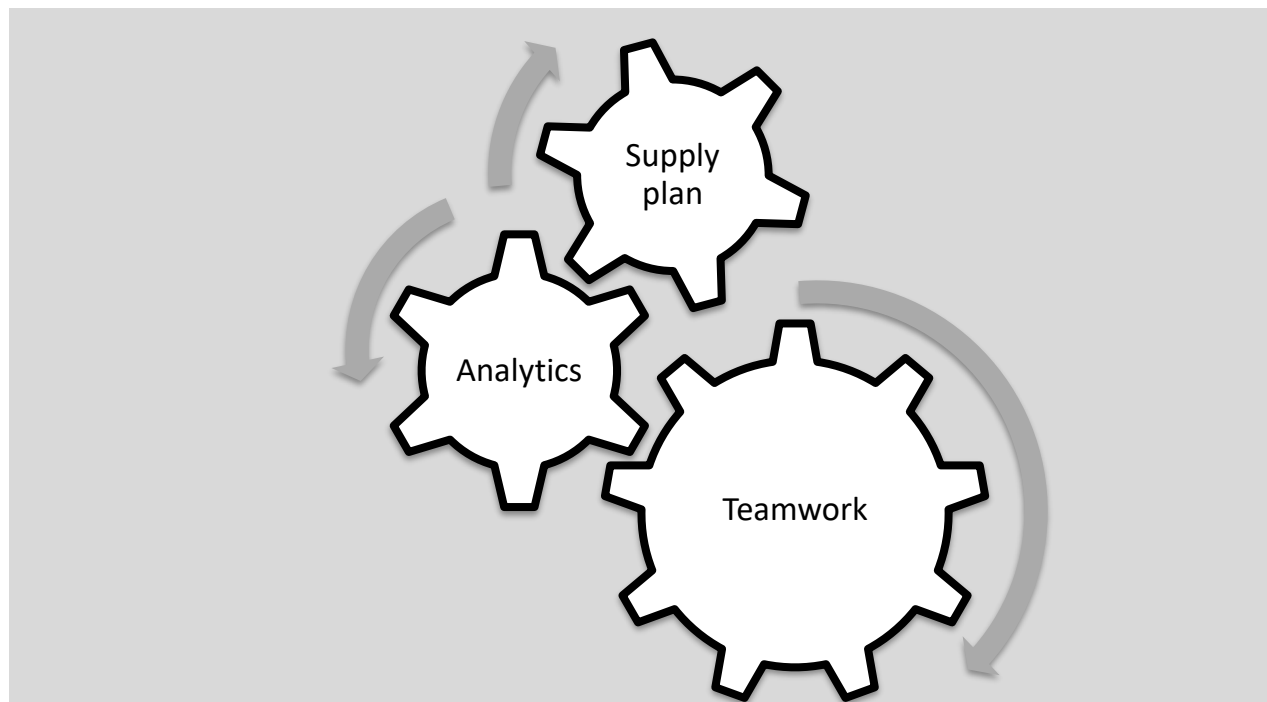
3 Tips for Specifying

1. **Clarity.** Develop and share your understanding of what a good specification looks like with procurement staff and stakeholders and invite their views and ideas.
2. **Roles.** Spend time with members of the procurement team explaining what their roles and responsibilities in the specification process are.
3. **Customer service.** Encourage procurement staff to focus on delivering a high quality service to help achieve the procurement strategy.



3 Tips for **Special Cases**

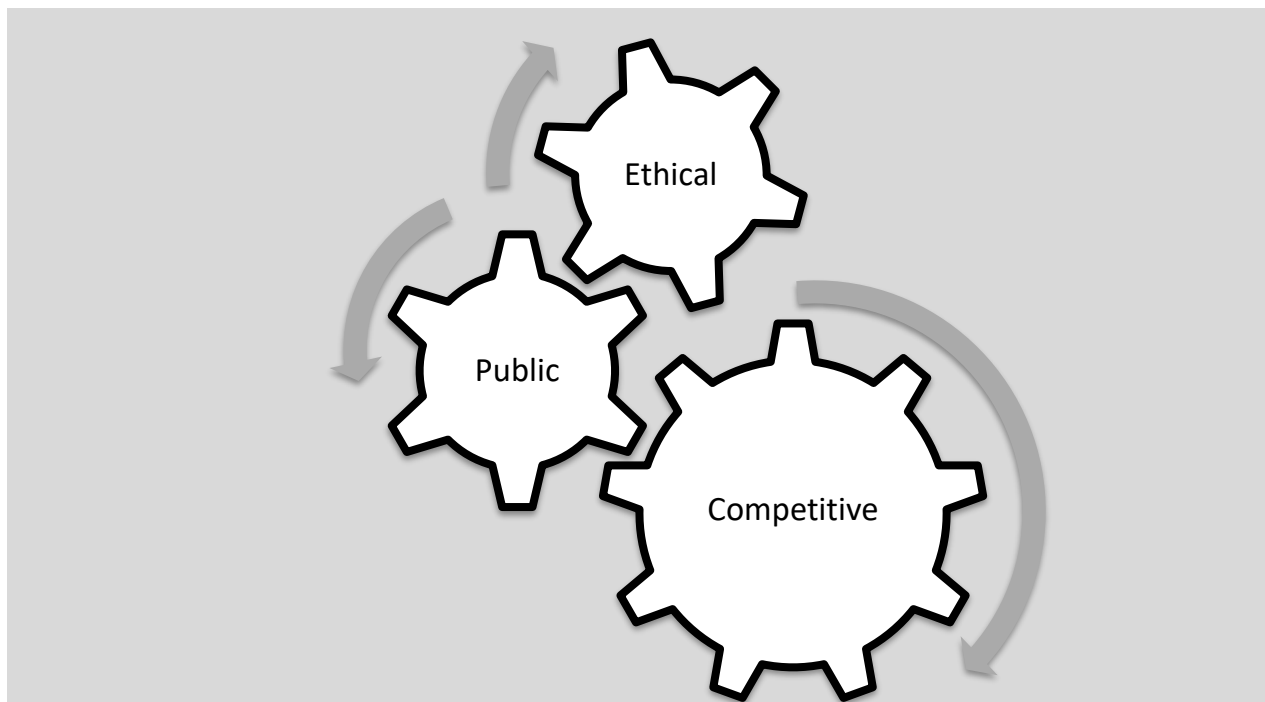
1. **Categories.** Explore the use of multifunctional category teams to support a strategic approach to procurement.
2. **Handling.** Review and plan for any special handling requirements, for example, for temperature sensitive products, controlled substances, and the local regulatory environment.
3. **Availability.** Confirm that the procurement strategy takes account of international trends in commodity availability.



3 Tips for Forecasting

1. **Teamwork.** Set up a multi-functional team and develop and agree terms of reference, work programme and deliverables.
2. **Analytics.** Collect and analyse data, select forecasting method(s) using available tools², clarify assumptions, and forecast likely demand scenarios.
3. **Supply plan.** Develop and validate supply plans using VEN analysis taking account of existing stocks, planned deliveries and budget constraints.

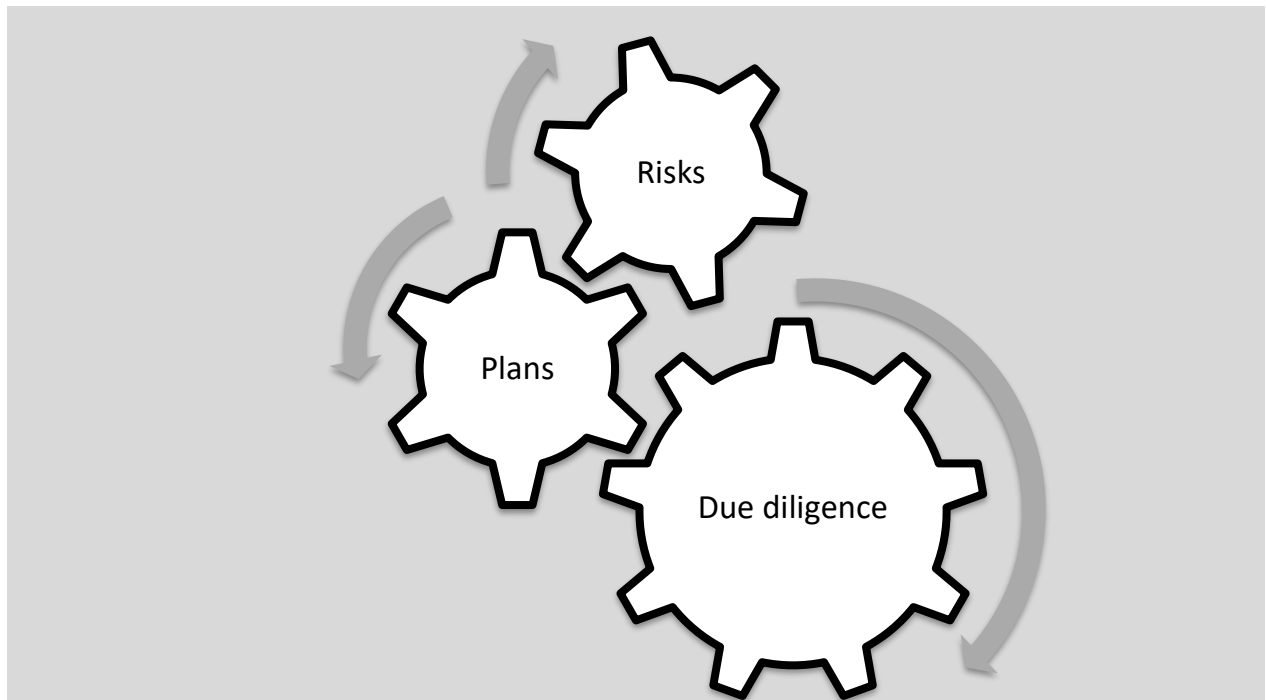
² PSM Tool Box, Estimating Medication Consumption, WHO Quantification of Health Commodities, JSI Defining Reproductive Health Supply Requirements, PATH, The Family Planning Logistics Toolkit, Promising Practices in Supply Chain Management - Series of Briefs, UN



3 Tips for Costing

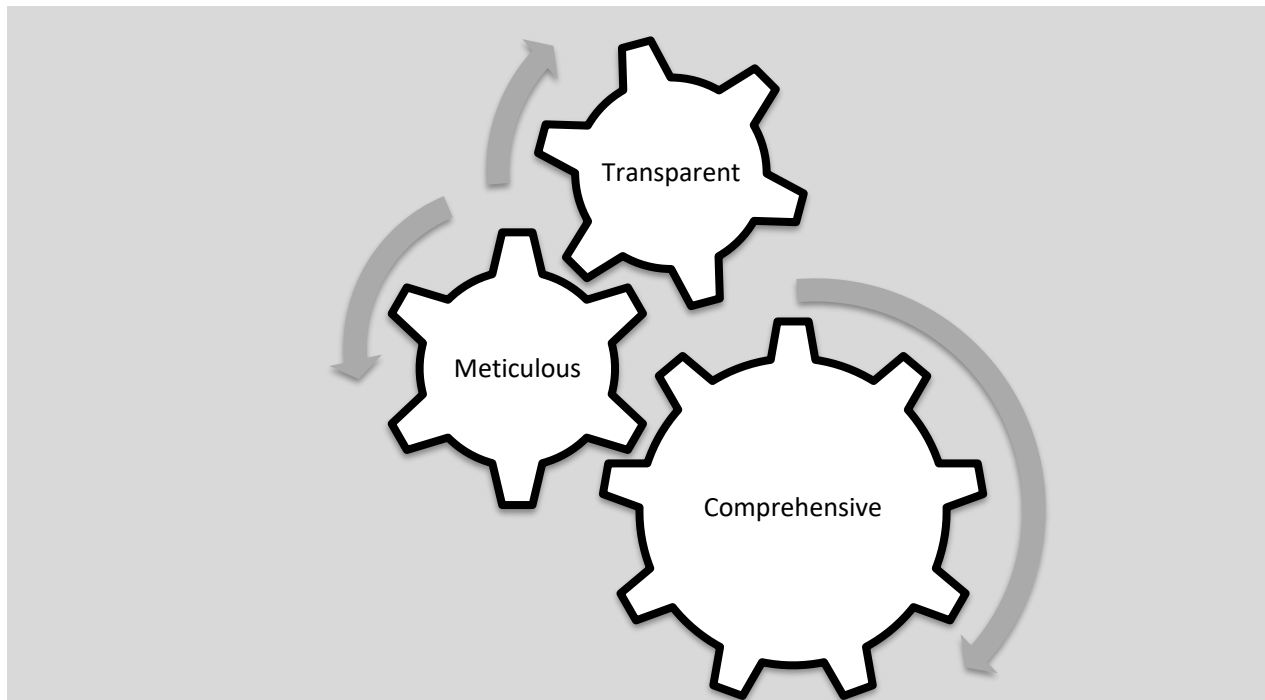
1. **Public.** Share your understanding of the guiding principles governing public procurement with the team and suppliers--transparency, competition, fairness, integrity, accountability, best value for money, interest of the organization³.
2. **Competitive.** Drive down costs through competitive tendering, market shaping activities (such as GAVI/UNICEF's strategic demand forecasting, long term supply agreements), bilaterally negotiated discounts, and global bulk purchasing schemes.
3. **Ethical.** Ensure everyone in the team understands what ethical procurement means and challenge the team to report any incidences of actual or perceived malpractice--for example, corrupt, fraudulent, collusive, coercive, and obstructive.

³ UNFPA Price Indicator, International Drug Price Indicator Guide, International price guides, WHO UNICEF price guide



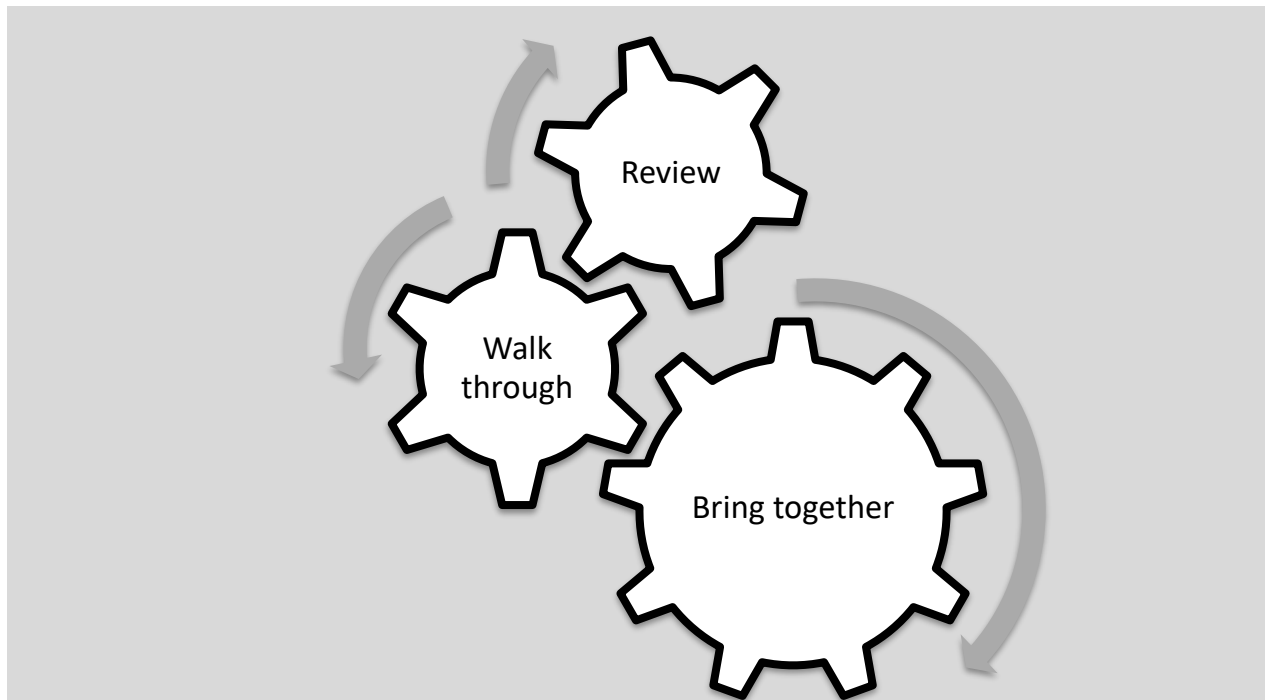
3 Tips for Relating

1. **Plans.** Develop and implement supplier relationship management plans distinguishing between strategic and non-strategic suppliers.
2. **Due diligence.** Carry out due diligence in bid assessment to capture problems upfront, and reduce the possibility of common medicine procurement problems.
3. **Risks.** Identify potential risks and develop contingency plans addressing potential supplier and delivery problems.



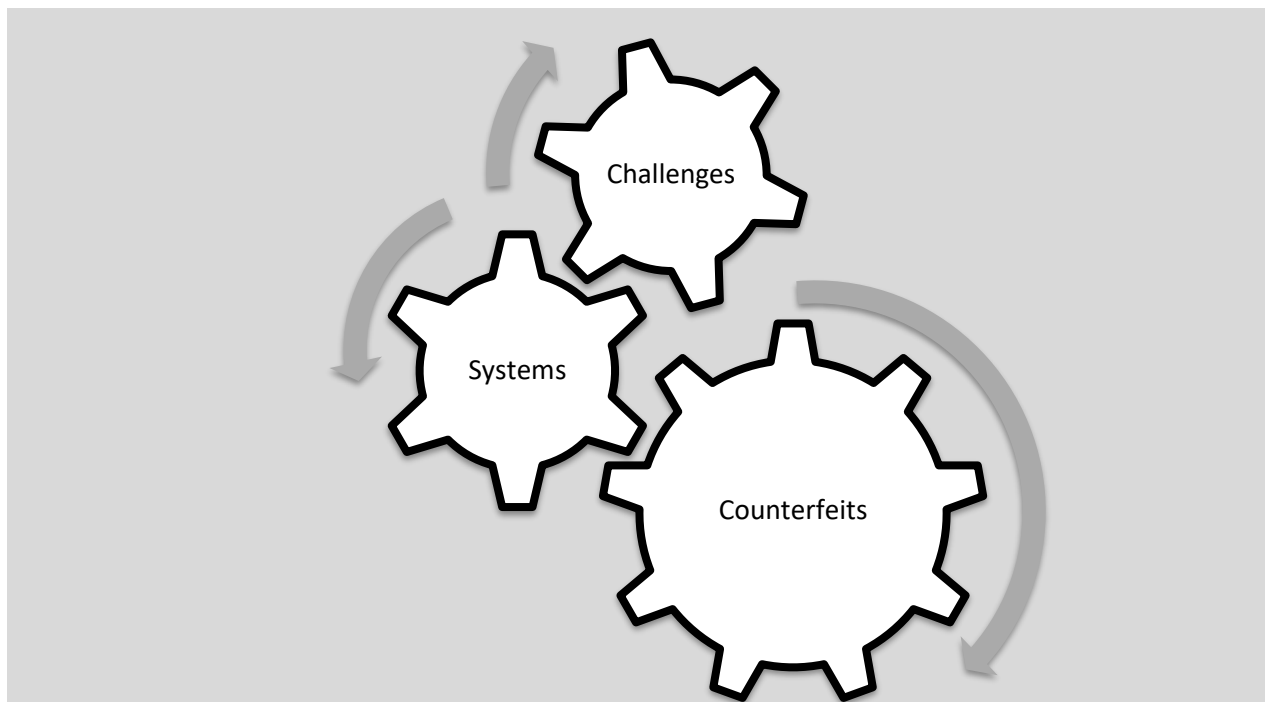
3 Tips for **Tendering**

1. **Comprehensive.** Draft bid documentation carefully with the contract in mind ensuring that the documentation covers product characteristics, required quantities and time lines, and the expected supplier profile and capabilities.
2. **Meticulous.** Manage tendering procedures conscientiously and meticulously making certain that any potential conflicts of interest are handled properly.
3. **Transparent.** Evaluate bids fairly and transparently against bid document criteria ensuring additional evaluation criteria are not added after bidding has closed.



3 Tips for Contracting

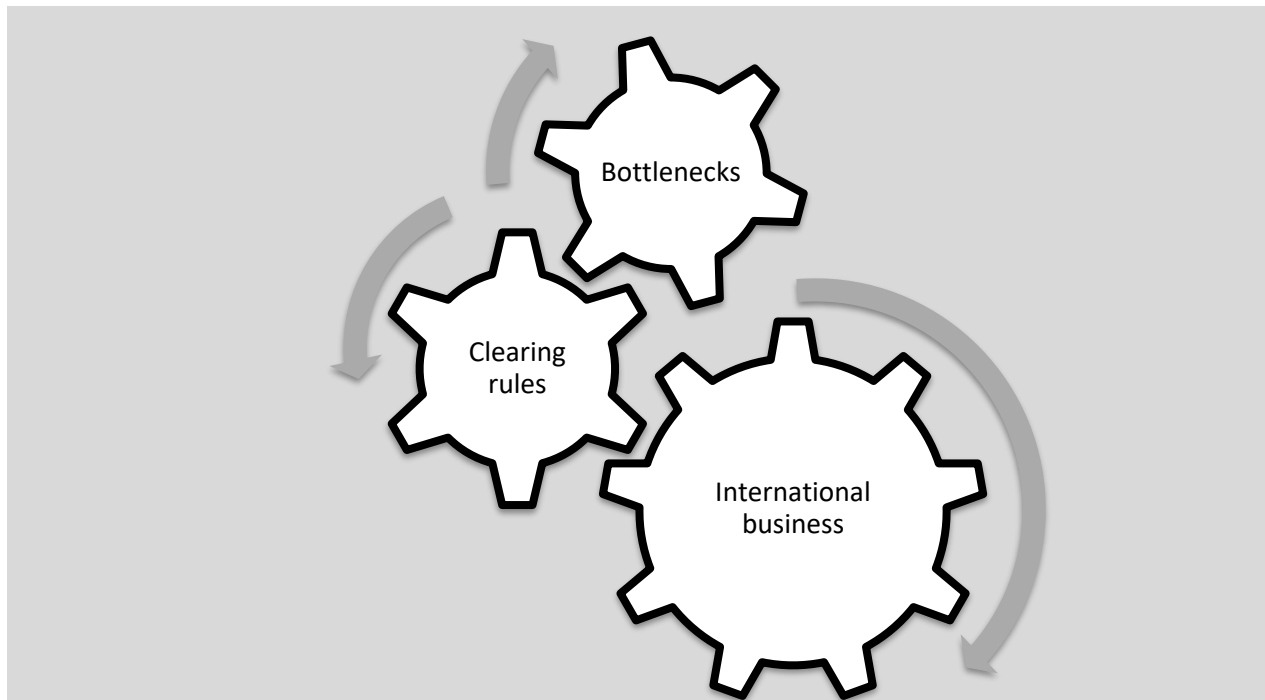
1. **Bring together.** Ensure contracts include all the essential information covered in bid documents such as pricing, quality and performance requirements, delivery timelines etc.
2. **Walk through.** Carry out joint walk-throughs so that all relevant people who need to know about the contract understand the scope of the contract and what is required of them.
3. **Review.** Carry out regular performance reviews with suppliers to manage performance, build trust, and reduce risks. Record compliance with the contract terms and conditions including on-time delivery performance, quantities delivered as ordered, shelf life after delivery and other quality KPIs as agreed.



3 Tips for **Monitoring**

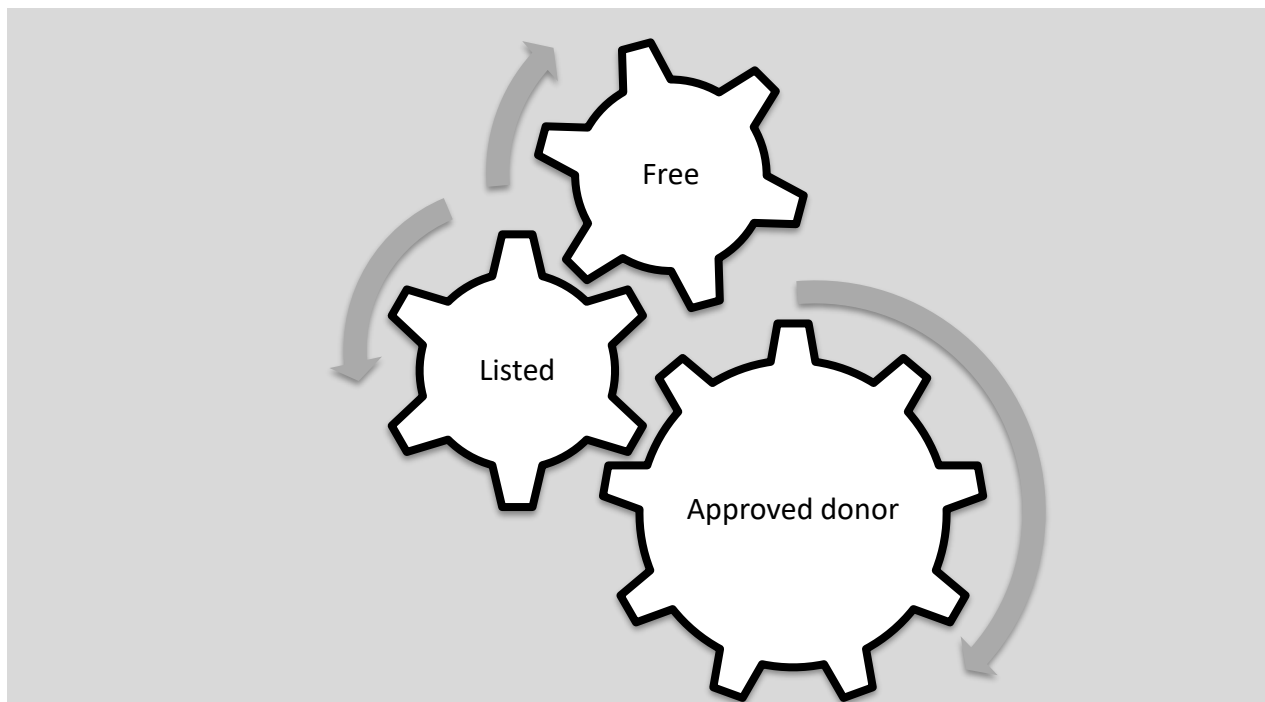
1. **Systems.** Plan and implement a systems approach to quality assurance⁴ using KPIs targeting priority-risk areas to help prevent quality problems from happening along the entire supply chain.
2. **Challenges.** Identify potential quality challenges deserving extra attention, for example: new suppliers, poorly performing suppliers, challenging seasonal circumstances, and products with a narrow therapeutic window.
3. **Counterfeits.** Check that people recognise the differences between counterfeit and substandard medicines, and know what steps can be taken to avoid fake products entering the market.

⁴ Counterfeit Medicines, WHO, Fight the Fakes, RX 360, Counterfeit Project, Example Contract Documents for Pharmaceuticals, Practical Guidelines on Pharmaceutical Procurement for Countries with Small Procurement Agencies, Good Manufacturing Practice, United Nations General Marketplace



3 Tips for **Importing**

1. **International business.** Develop and share your understanding of international business processes, for example, shipping, air cargo, clearing and forwarding, financial transactions, and business ethics.
2. **Clearing.** Follow country-specific rules and procedures to obtain the documents needed for clearing before the arrival of supplies at a port, and ensure they are in accordance with the country's port and customs requirements.
3. **Bottlenecks.** In case of ongoing, severe clearing problems, initiate discussions with authorities to identify bottleneck issues and agree actions to address them. Escalate if necessary.

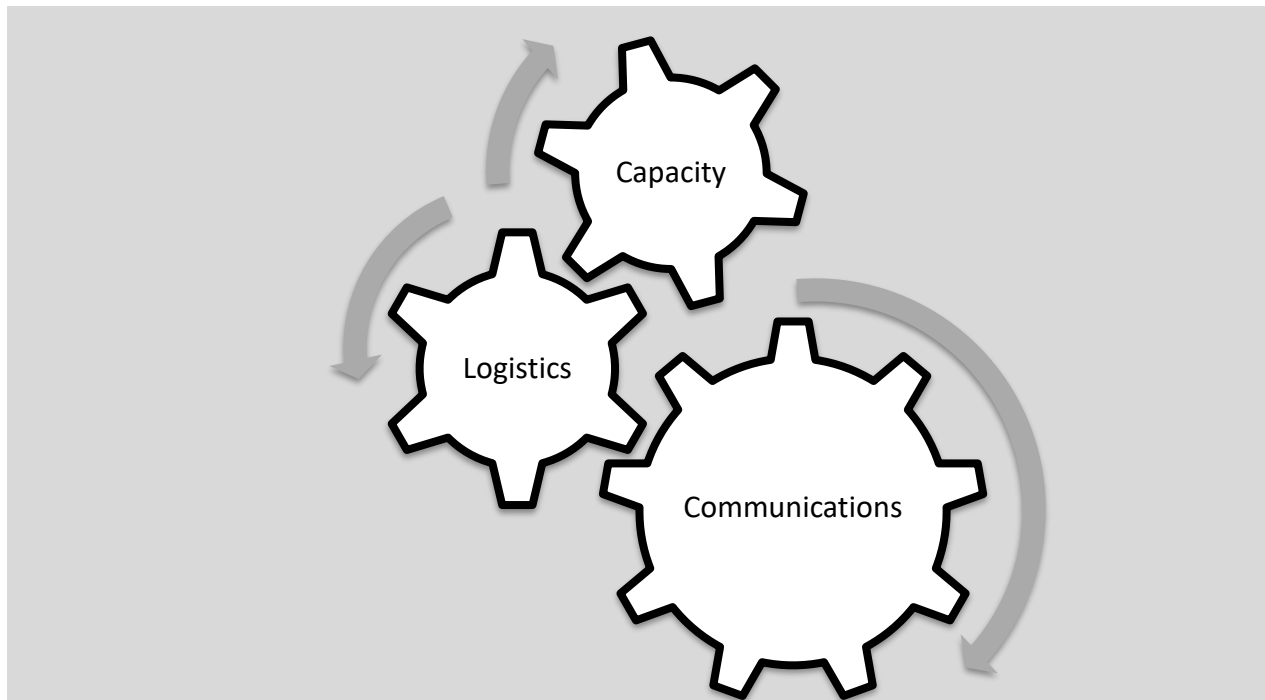


3 Tips for Donating

1. **Approved donor.** Check that donors have permission from the relevant Government department(s) to donate medicines.
2. **Listed.** Check that donated medicines are on the Essential Medicines List⁵. The medicines should look similar and be of similar strength to what you use⁶.
3. **Free.** Check that donated medicines are free. They should be in date and labeled in English with the medicine name, strength, form, batch and expiry, storage conditions and manufacturers name clearly printed.

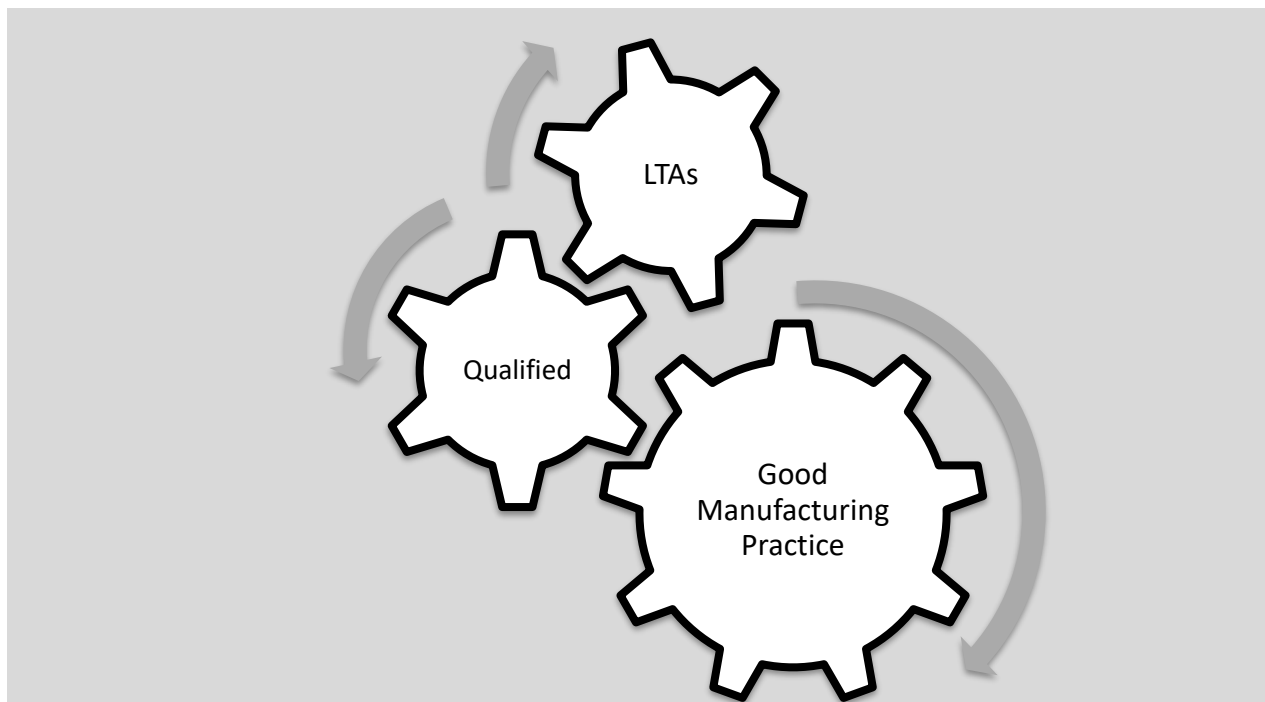
⁵ WHO Essential Medicines List,

⁶ WHO Medicines Donation Guidelines



3 Tips for **Preparing for Emergencies**

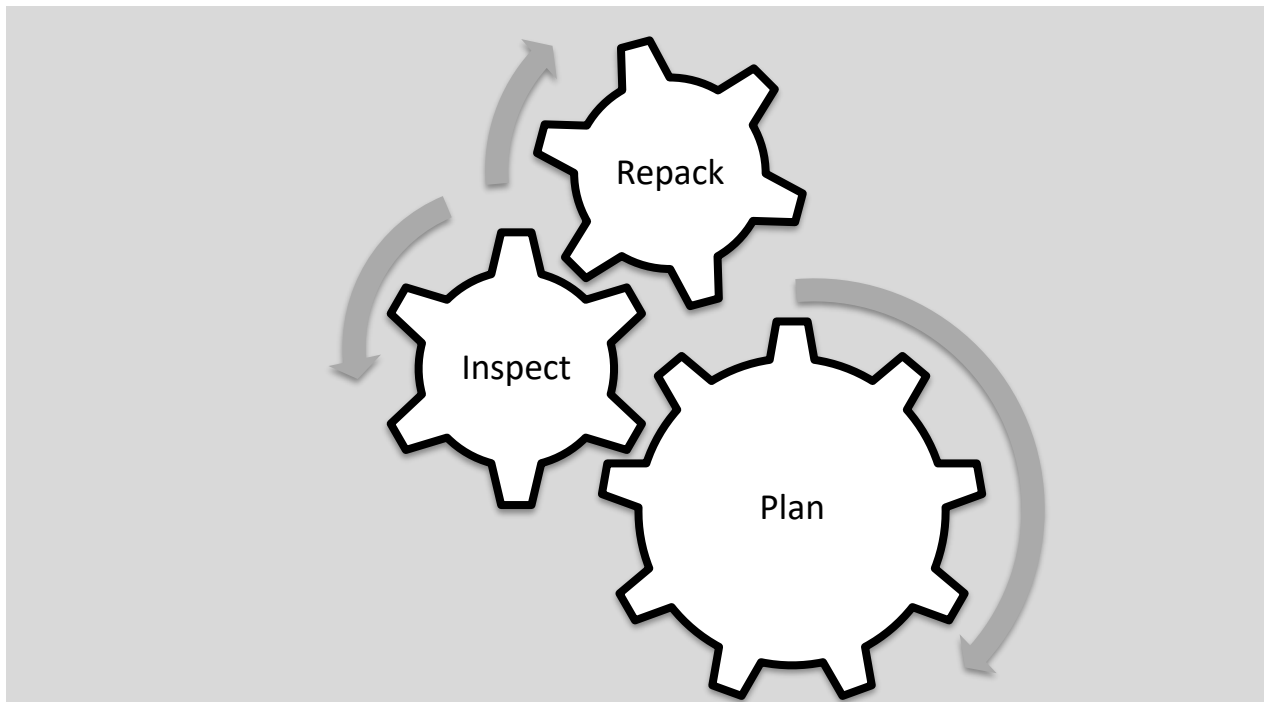
1. **Communication.** Build relationships and communicate regularly with members of the national disaster planning team.
2. **Logistics.** Identify the procurement and logistic requirements for emergency supply and decide if and how procurement needs to be changed. Identify any issues that may restrict or delay supply.
3. **Capacity.** Carry out an assessment of local capacity to determine what additional support may be required to support local areas.



3 Tips for Manufacturing

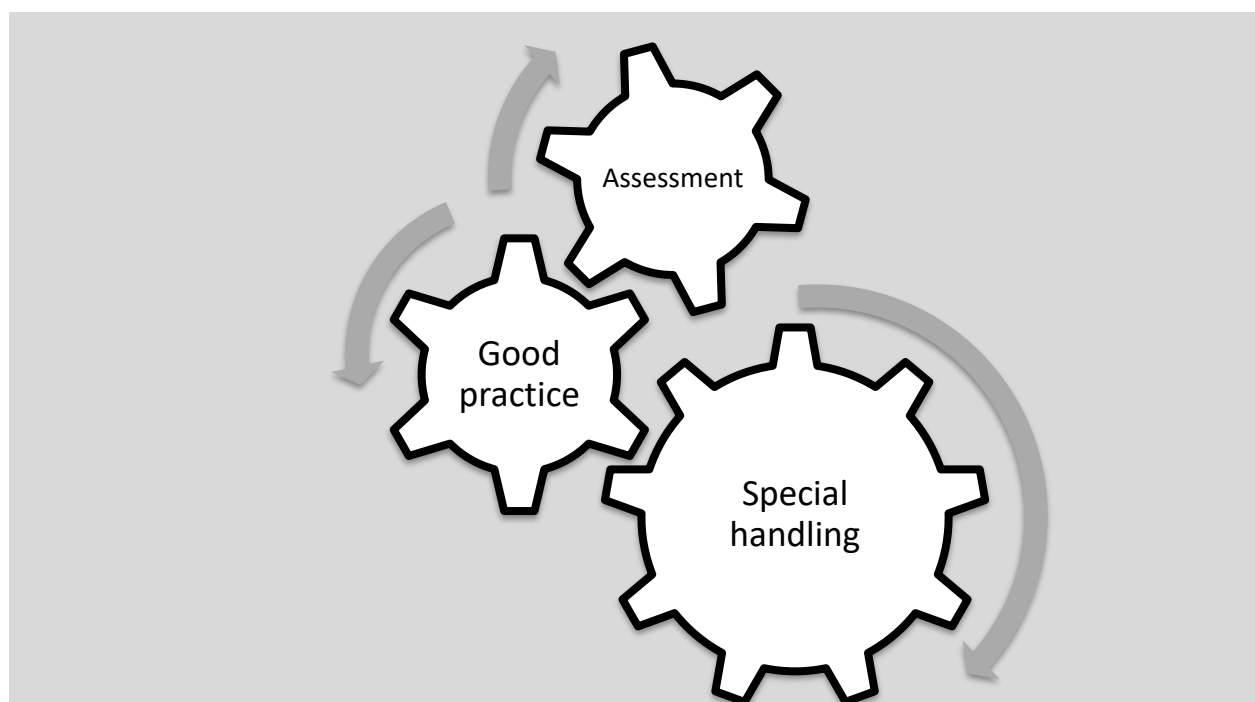
1. **GMP.** Ensure that the procurement team understands WHO guidelines on Good Manufacturing Practice. Identify local pharmaceutical companies certified by WHO.
2. **Qualified.** Check that companies on the bidders list have pre-qualified as manufacturers that comply with Good Manufacturing Practice (GMP) guidelines⁷.
3. **LTAs.** Develop long term agreements with manufacturers for larger orders to improve procurement efficiency and achieve cost savings.

⁷ Who Prequalification, WHO Vaccine Prequalification, WHO Prequalified Database, Global Fund Prequalified USAID Prequalified Suppliers, WHO List of Prequalified Quality Control Laboratories



3 Tips for Repacking

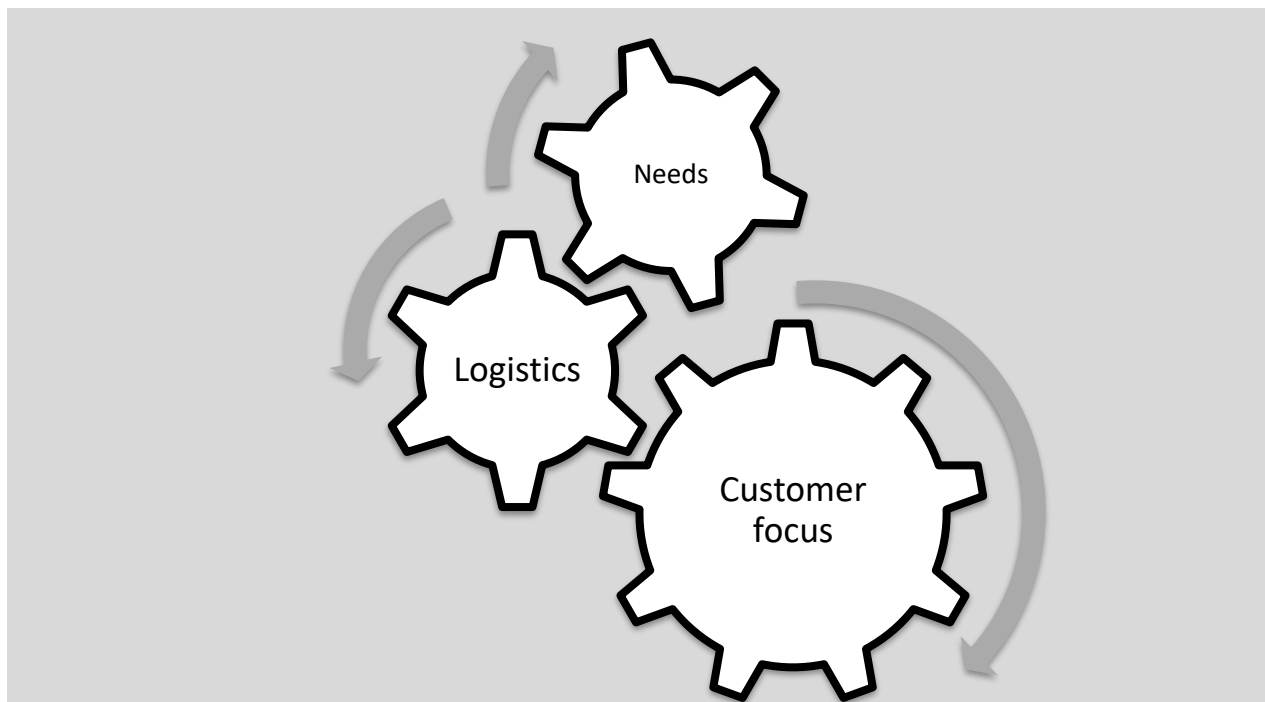
1. **Plan.** Appraise as part of procurement planning when repacking and/or prepacking is likely to be required.
2. **Inspect.** When medical products are unpacked, ensure that they are checked for damage before they repacked.
3. **Repack.** Design efficient and safe arrangements for repacking and review periodically with stakeholders.



3 Tips for Storing

1. **Good practice.** Develop and share your understanding of storage points and processes in the health supply chain and ensure you are following good storage practice⁸.
2. **Special handling.** Review whether you have an effective cold chain system and are following the correct handling procedures so that temperature-sensitive products are effective and safe to use when they reach end-users.
3. **Assessment.** Carry out warehouse assessments collaboratively with stakeholders using tools such as the Logistics System Assessment Tool (LSAT) and the Inventory Management Assessment Tool (IMAT).

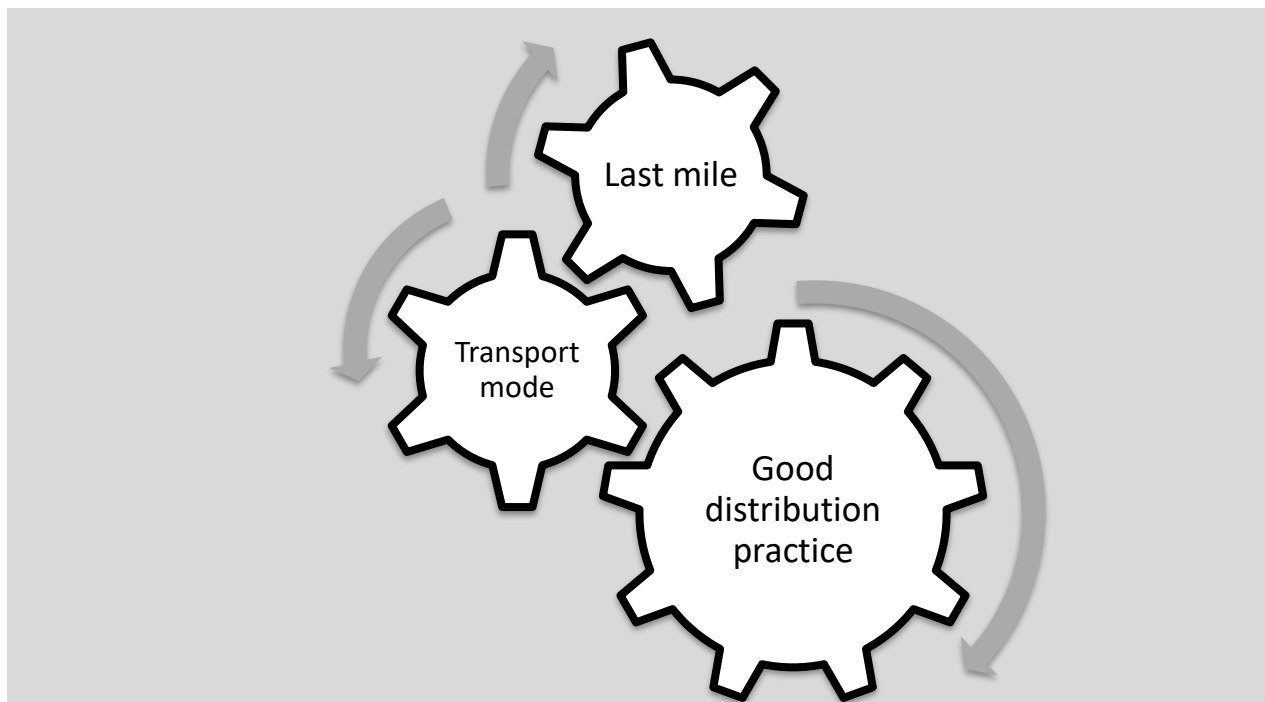
⁸ Guidelines for Warehousing Health Commodities, Warehouse in a Box, m-Supply ELMIS, Open LMIS



3 Tips for Supplying

1. **Needs.** Understand when and how to use push, pull, and hybrid approaches to determining medical product needs.
2. **Logistics.** Develop and implement a logistics strategy⁹, plan and management information system for ordering and distributing products among suppliers, distribution centres, warehouses and customers.
3. **Customer focus.** Measure customer satisfaction using performance metrics taken from the customer perspective, with criteria such as on-time delivery, perception of quality, complaints and length of wait times.

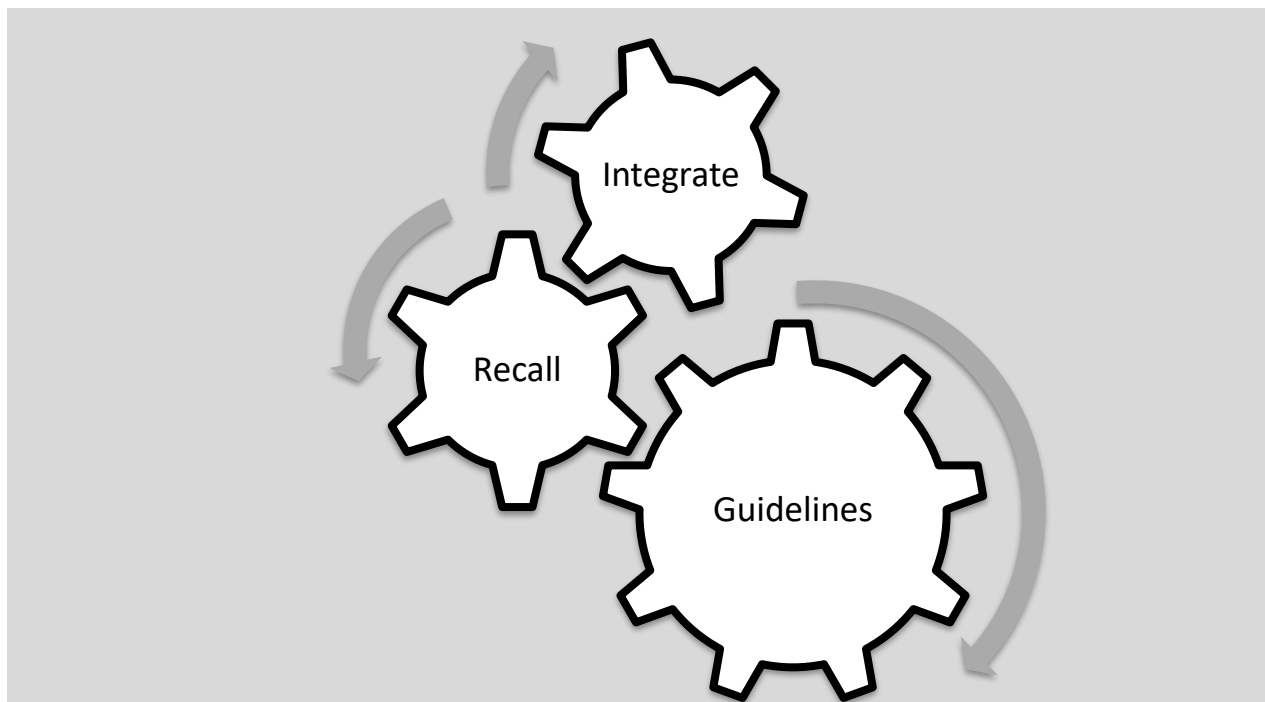
⁹ Practical Guide to Health Supply Chain Logistics Management, Managing Drug Supply (3rd Edition), Management Sciences for Health, WHO Cold Chain, UNICEF Cold Chain Support Package, Guidelines for Transporting Medical Gases



3 Tips for Transporting

1. **Transport mode.** Select the most appropriate transportation in the light of local conditions, for example, consignment characteristics, time requirements, cost constraints, access to the delivery points, transport infrastructure, climate conditions etc.
2. **Good distribution practice.** Share your understanding of good distribution practices¹⁰ for pharmaceutical products with team members and review and discuss how far you are following best practice.
3. **Last mile.** Identify and address challenges to do with access, reach and availability of trained workers as part of designing and improving medicine supply chains. Equitable access to health means availability of essential medicines for all, regardless of where people live.

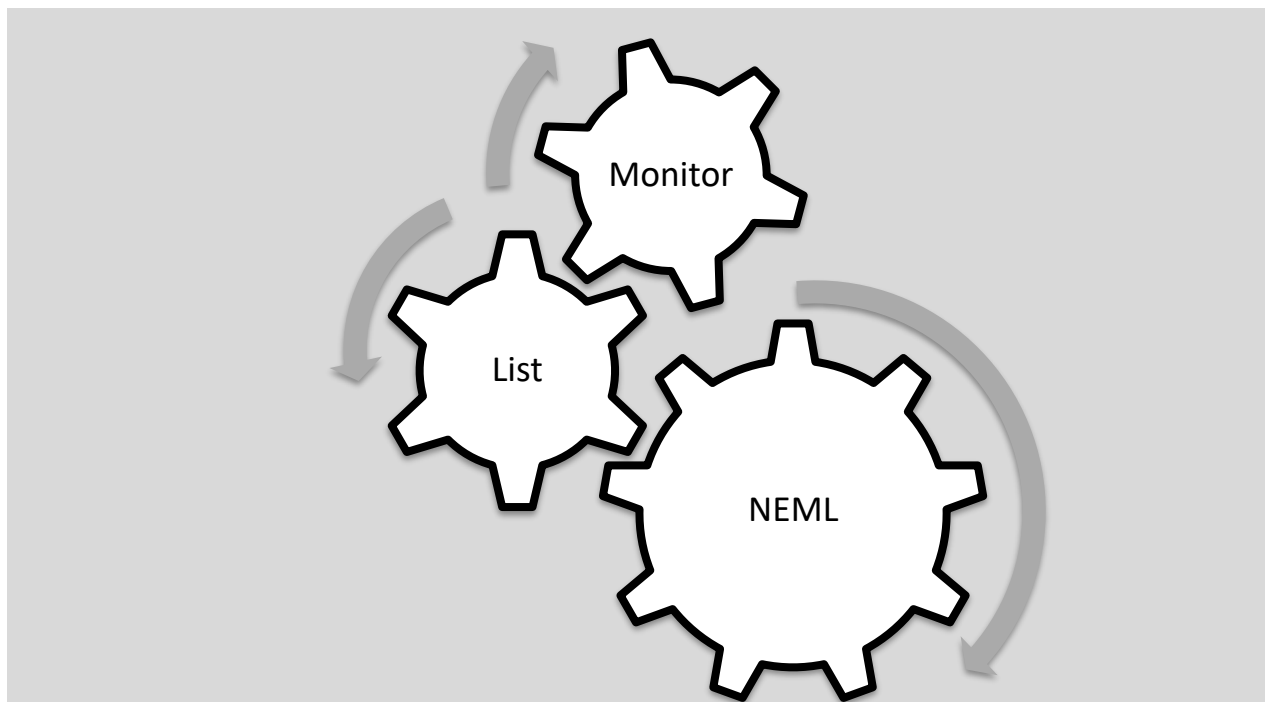
¹⁰ Transaid Transport Resources, Riders, Using Last Mile Distribution to Increase Access to Health Commodities, Vendor Managed Inventory System A, Vendor Managed Inventory System B, Project Last Mile USAID



3 Tips for **Disposing**

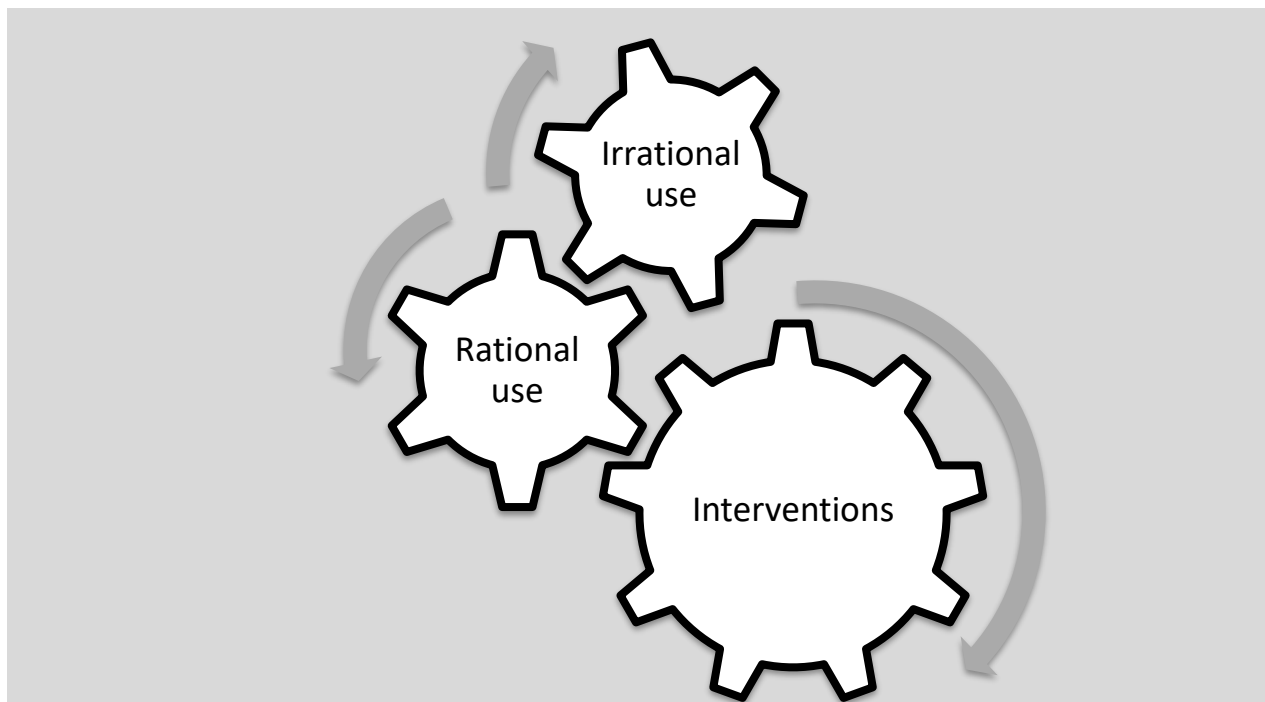
1. **Integrate.** Plan and integrate reverse logistics into strategic, operational and risk management planning.
2. **Recall.** Evaluate reasons for recall in your supply chain and the effectiveness of recall arrangements. Ensure staff understand reasons for removing medical products from the supply chain.
3. **Guidelines.** Use available guidelines¹¹ to help carry out disposal and recall efficiently and effectively. Evaluate effectiveness as part of supply chain quality assurance activities.

¹¹ WHO Disposal Guidelines, Example Guidelines for Pharmaceutical Recall, Guidelines for Functional Pharmacovigilance System



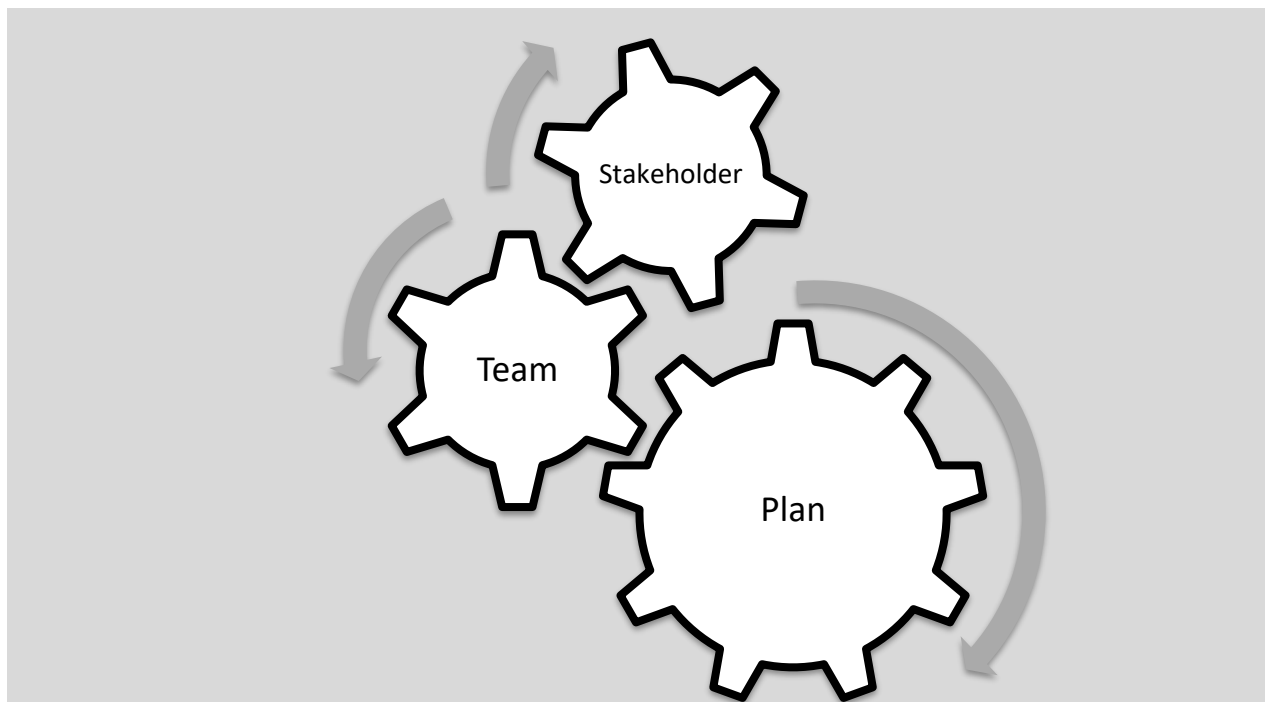
3 Tips for **Dispensing**

1. **NEML.** Develop and share your understanding of the benefits of an up-to-date National Essential Medicines List, for example, cost savings, easier dispensing, better stock control, guide for donors etc.
2. **List.** Produce and maintain an up-to-date list of which medicines can be prescribed by different prescribers.
3. **Monitor.** Monitor and evaluate the effectiveness of dispensing by health professionals and handling by patients in your area.



3 Tips for Using

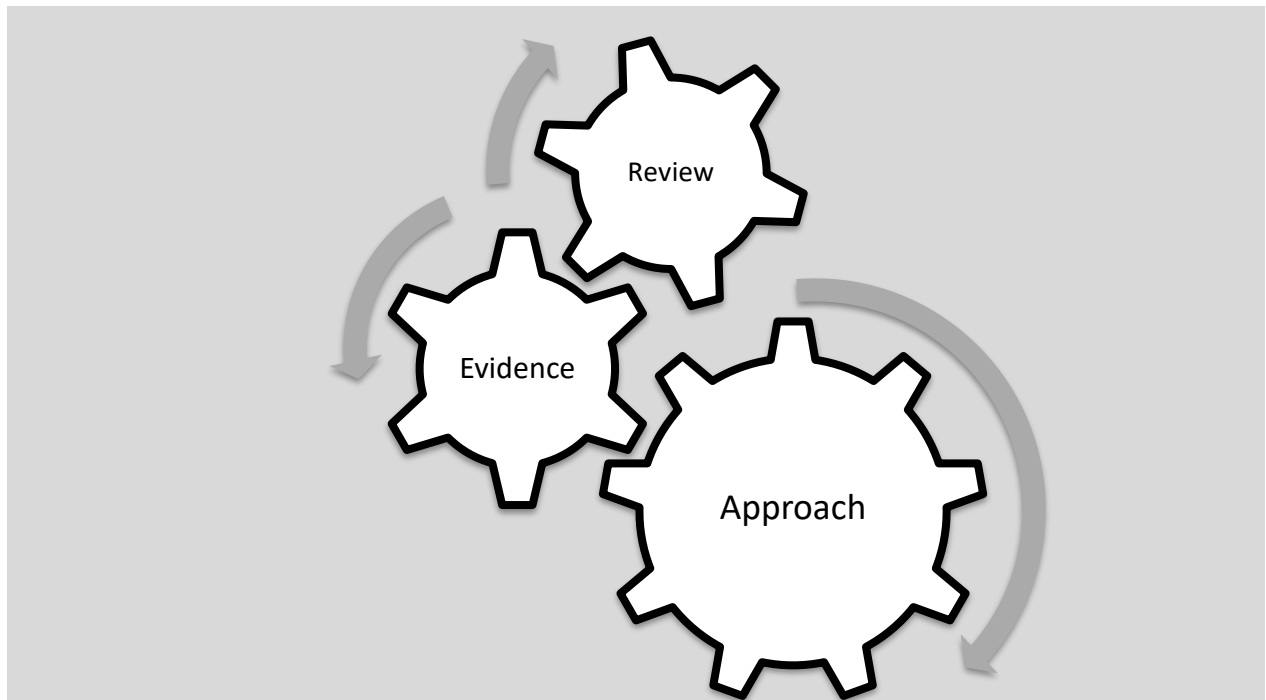
1. **Rational use.** Develop and communicate your understanding of the WHO definition of rational and appropriate use—for example, efficacy, safety, suitability, cost.
2. **Irrational use.** WHO estimates that more than half of all medicines are prescribed, dispensed or sold inappropriately, and that half of all patients fail to take them correctly. Assess how far this is a problem in your area.
3. **Interventions.** Evaluate medical product use in your area using the WHO list of twelve key interventions, and start a conversation with stakeholders about possible improvement actions.



3 Tips for Planning

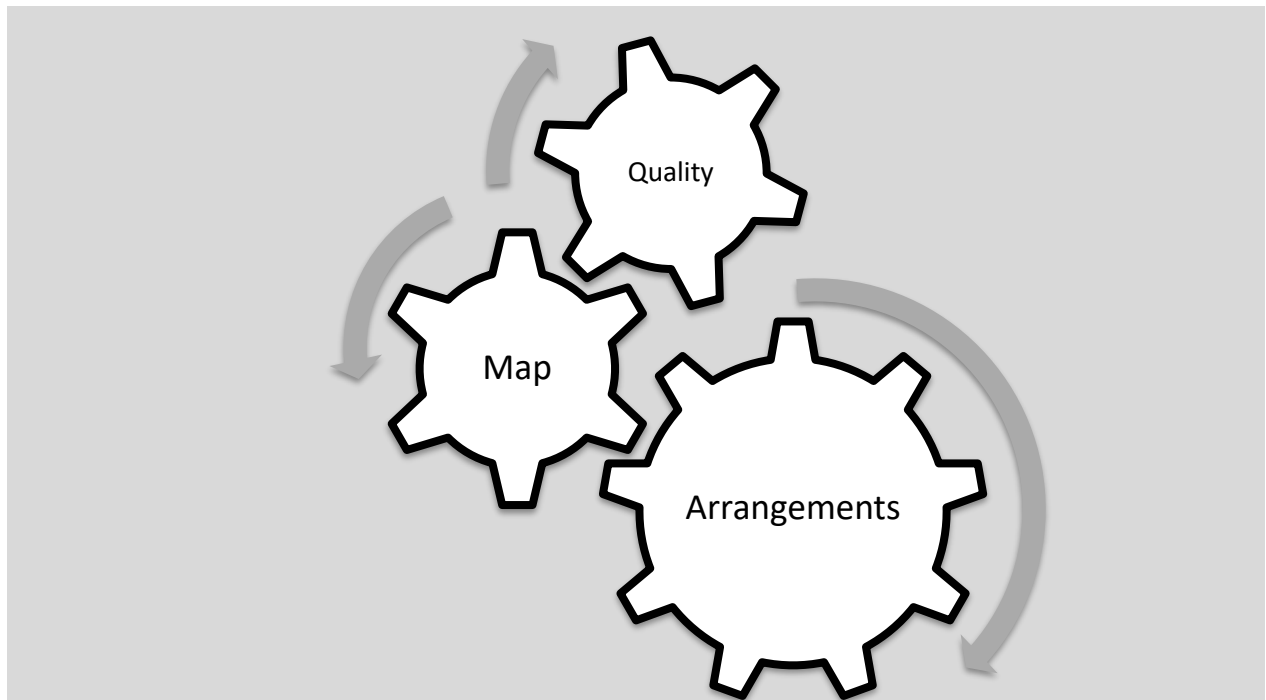
1. **Plan.** Brainstorm contents of mission, strategy and high-level plan with the team drawing on national guidance (see also key resources for understanding health supply chains¹²). Use project management tools to develop detailed operational plans.
2. **Stakeholder.** Communicate proposed strategy, plans and governance arrangements to stakeholders and listen to their views, ideas and suggestions.
3. **Team.** Ensure that team members have challenging objectives, and encourage team members to come forward with ideas and suggestions about how to achieve them.

¹² Practical Guide to Health Supply Chain Logistics Management, Managing Drug Supply (3rd Edition), Management Sciences for Health



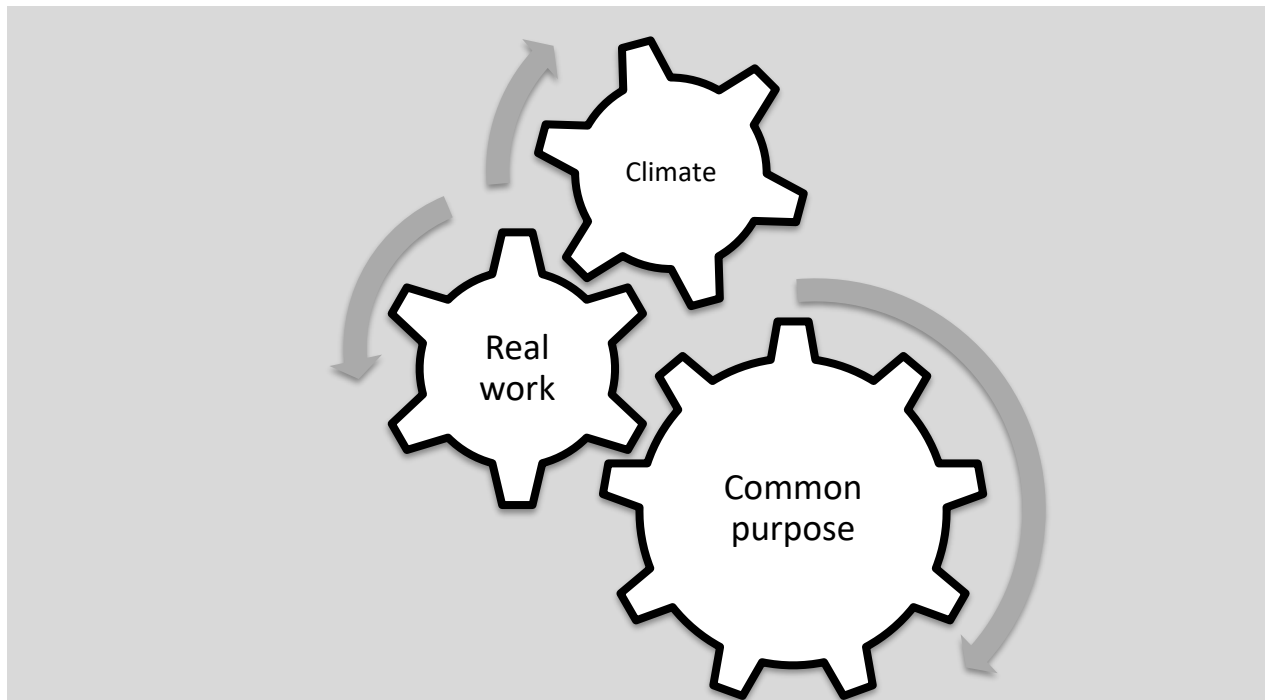
3 Tips for Deciding

1. **Approach.** Develop a structured approach to decision-making based on information gathering, analysis, evaluation and consultation.
2. **Evidence.** When something large is at stake, insist on getting all the information and evidence you need to make a sound decision.
3. **Review.** Carry out reviews of major decisions that you have made individually and with the team assessing outcomes and how to improve the process next time.



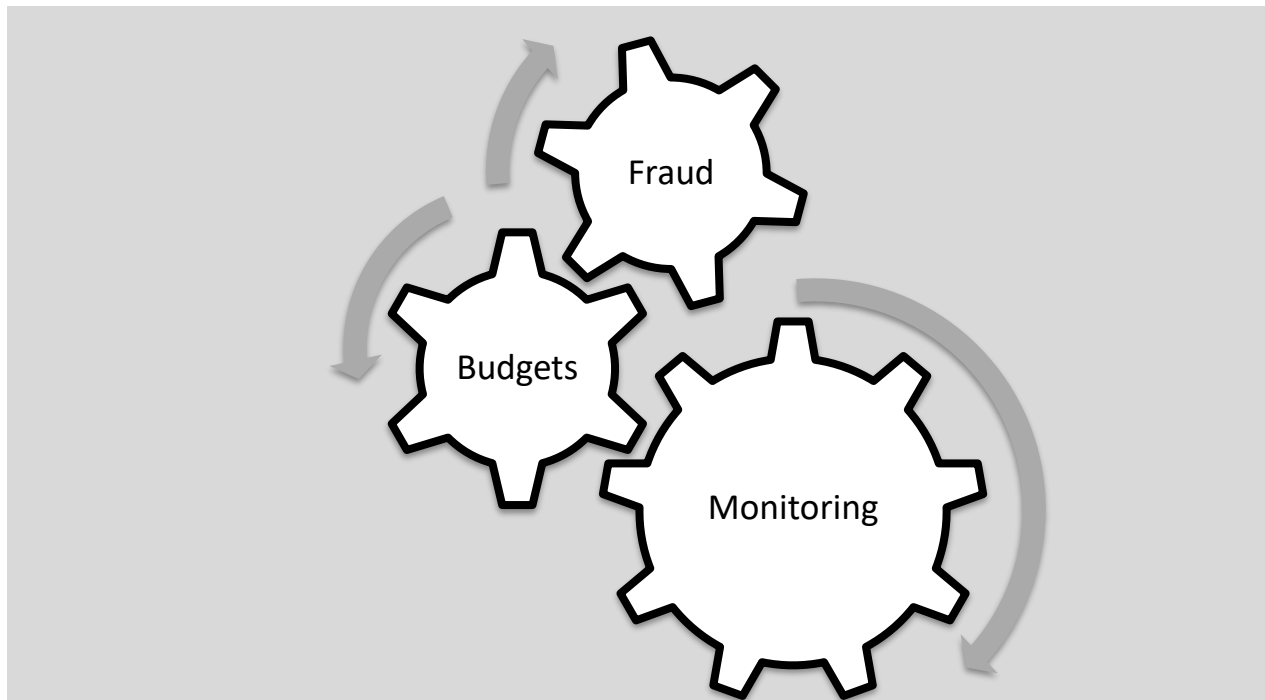
3 Tips for Partnering

1. **Map.** Create a stakeholder map identifying your key partners, customers and stakeholders. Share this map with the team.
2. **Arrangements.** Develop and agree formal and informal arrangements for communication and joint working with stakeholders. Review regularly the effectiveness of these arrangements.
3. **Quality.** Assess whether your organisation has genuine, open and collaborative relationships with its partners and suppliers.



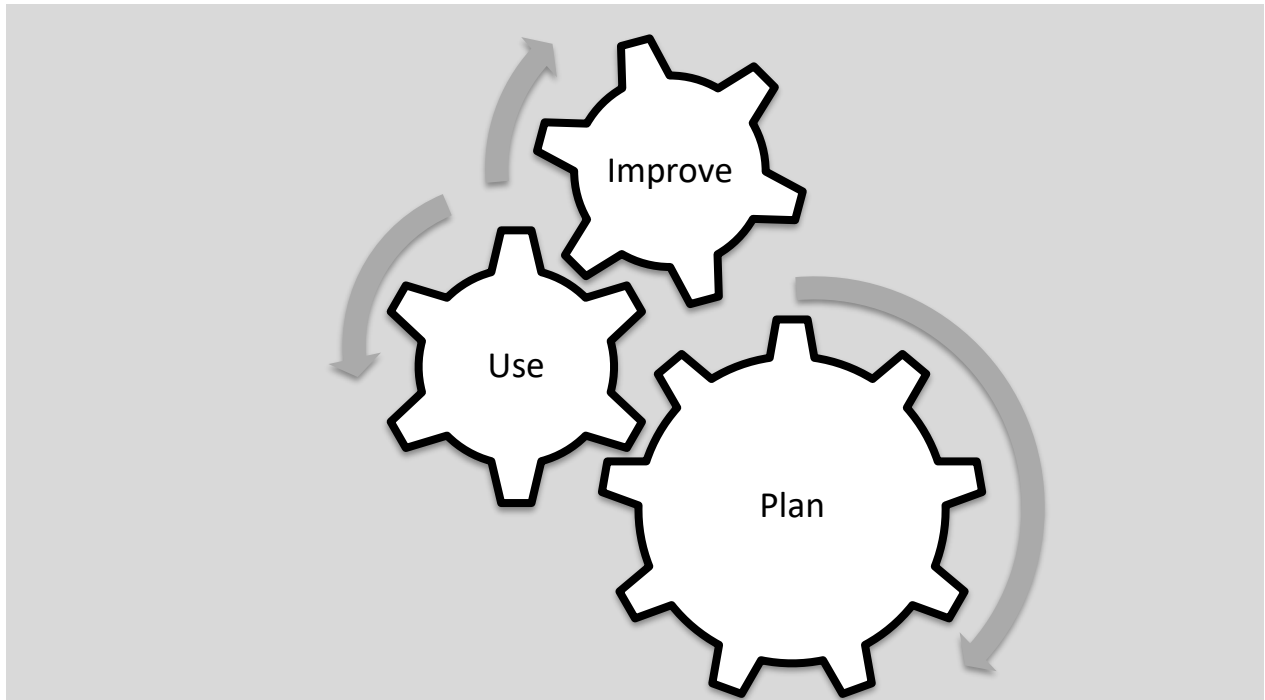
3 Tips for Teamworking

1. **Common purpose.** Invest time and effort exploring, shaping, and agreeing on a common purpose and translating it into specific performance goals.
2. **Real work.** Ensure that every member has a challenging goal and an equal amount of real work, and that everyone contributes in concrete ways to the team's goals.
3. **Climate.** Create a team environment where members feel safe to express their views and concerns and put forward ideas and suggestions.



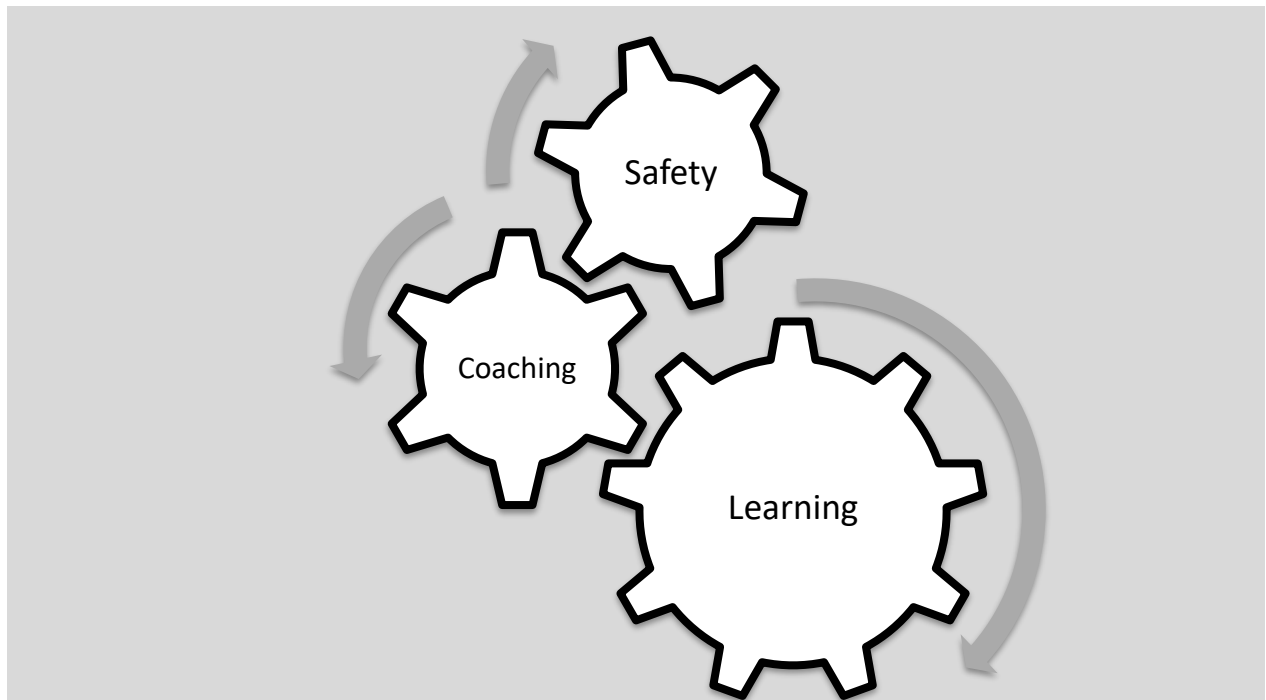
3 Tips for Resourcing

1. **Budgets.** Establish financial funding requirements, and create and manage budgets using good accounting and financial practices.
2. **Monitoring.** Establish which pieces of financial data you need to keep your eye on to know what shape your unit is in. Identify where you would cut costs if efficiencies are needed.
3. **Fraud.** Design systems to reduce risk of fraud, for example, reconciliation of purchase orders, receipts and payment approvals, dual signatory arrangements for funds transfers etc. Carry audit regular financial audits.



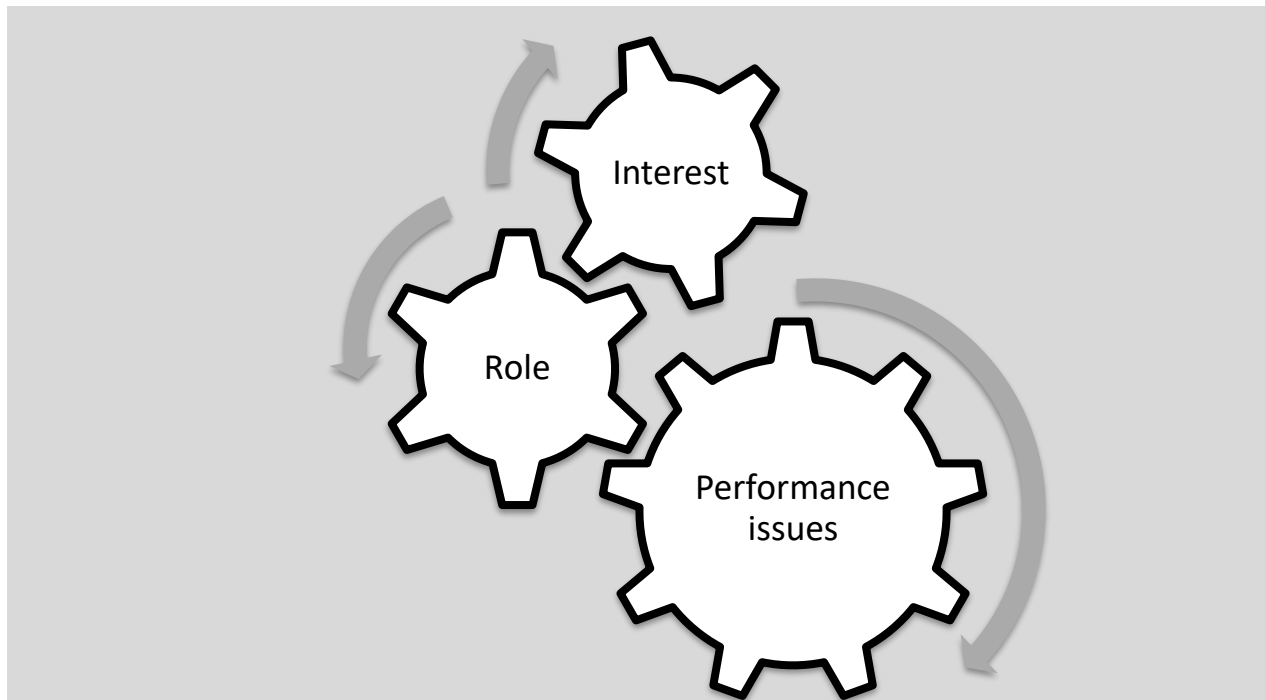
3 Tips for Recruiting

1. **Plan.** Review whether that you have the right people in key positions, and develop recruitment plans to fill any identified gaps and shortages.
2. **Use.** Develop and use a local human resources system for staff recruitment, appraisals, development, retention, performance monitoring and staff exit.
3. **Improve.** Evaluate how successful your human resources decisions have been, and determine how to improve human resources decisions in the future.



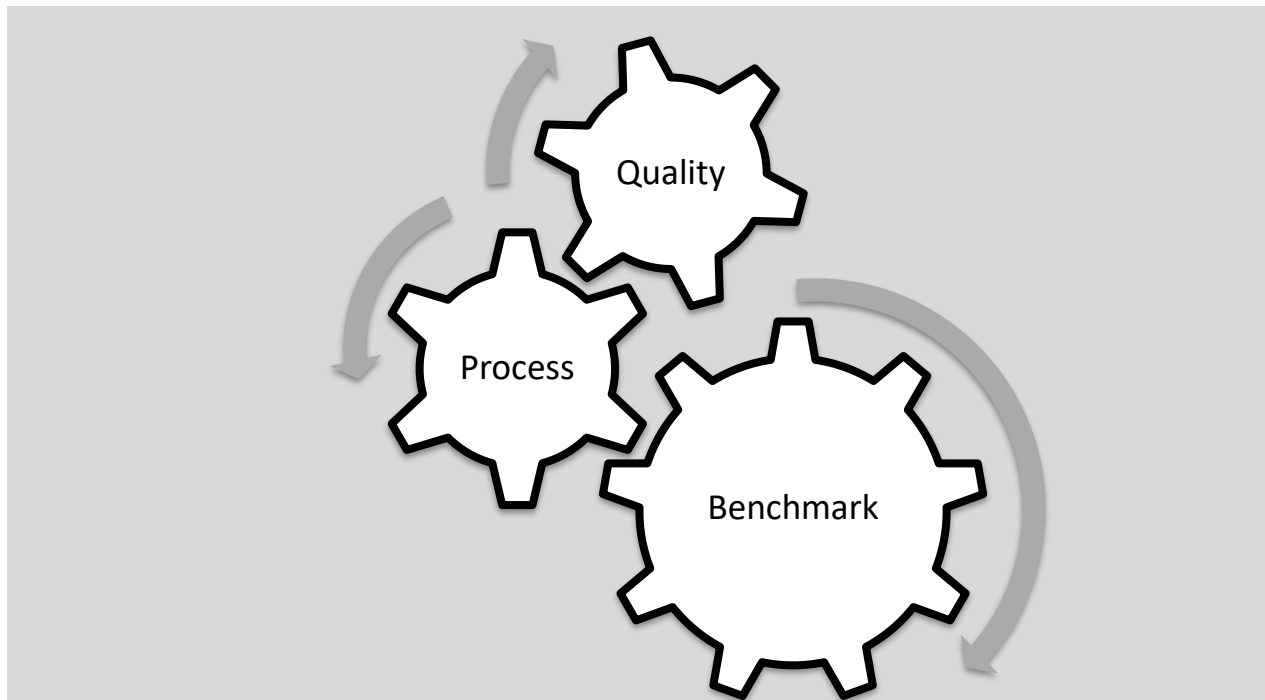
3 Tips for Training

1. **Learning.** Actively manage learning and training activities so that the team has the right blend of technical, interpersonal and problem solving skills.
2. **Coaching.** Integrate development and coaching into team planning and performance management. Focus coaching efforts on how to help people produce better results for the organisation.
3. **Safety.** Ensure members of staff at all levels of the supply chain have the necessary skills and understanding for safe work practices.



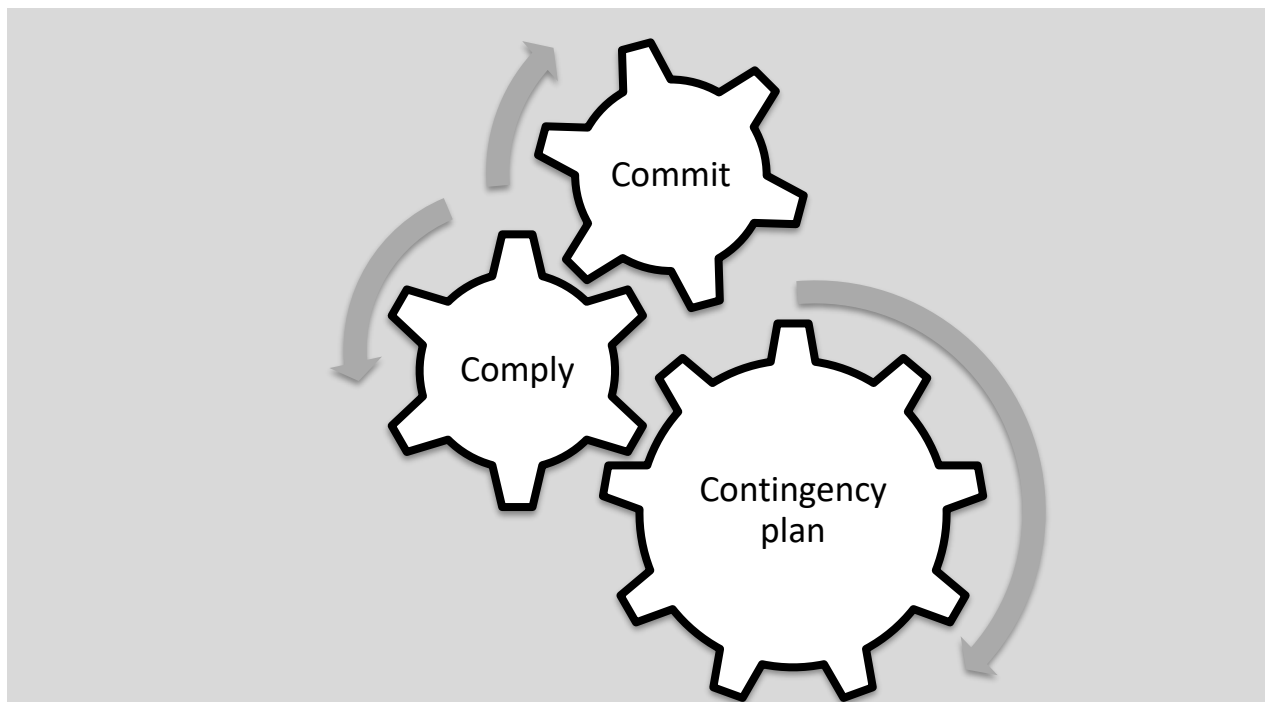
3 Tips for Supervising

1. **Interest.** Take an interest in your team members to find out what moves them, gives them satisfaction, makes them feel good etc. Provide feedback, encouragement and support.
2. **Role.** Develop and share your understanding of the nature of the supervisory role, what is meant by direct supervision, and where responsibility for outcomes rests.
3. **Performance issues.** Identify situations where personnel are experiencing difficulties in carrying out work activities. Determine whether additional guidance or support is needed and/or whether a formal warning for poor performance needs to be given.



3 Tips for Quality Assuring

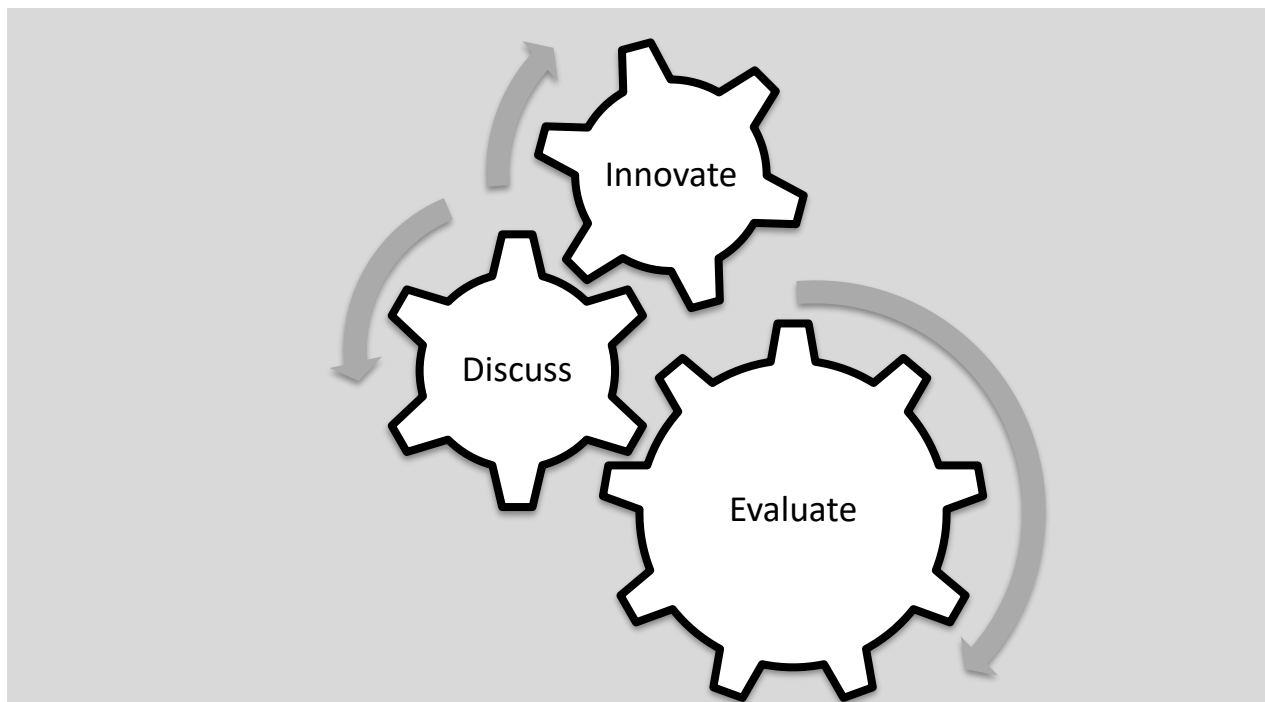
1. **Quality.** Develop and share your understanding of quality improvement approaches, and discuss and agree quality standards with the team.
2. **Process.** Develop and share your understanding of process improvement approaches, and discuss and agree responsibilities for processes.
3. **Benchmark.** Benchmark your operations against those of best-in-class organisations, and identify and adopt best practice from within and outside the organisation.



3 Tips for Reducing Risks

1. **Commit.** Demonstrate your commitment to creating a safe working environment and carry out training programmes and drills covering, for example, fire and armed hold-up drills, safe manual handling practices, use of mandatory safety clothing.
2. **Comply.** Carry out regular compliance checks of your operations with policies and procedures designed to maintain security and workplace safety.
3. **Contingency plan.** Develop contingency plans for risky situations¹³ and worst case scenarios affecting supply, transformation, delivery, and customer demand.

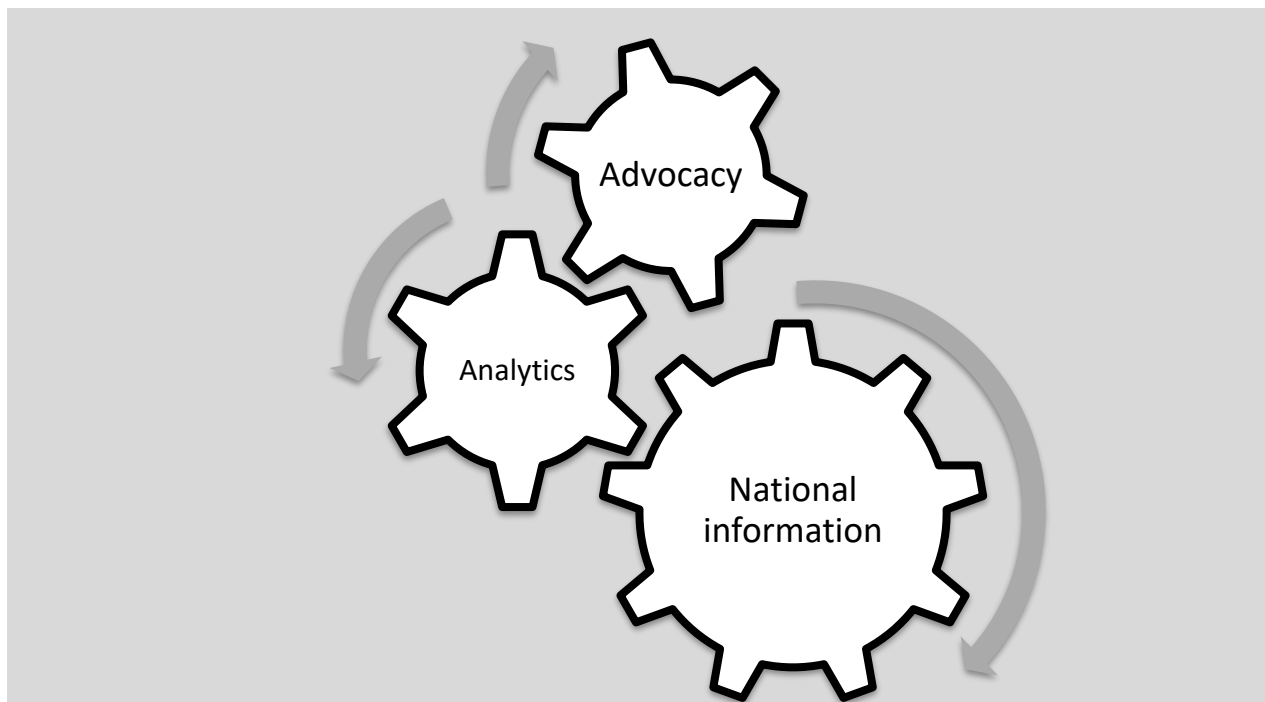
¹³ Risk Management for Public Health Supply Chains



3 Tips for Sustaining

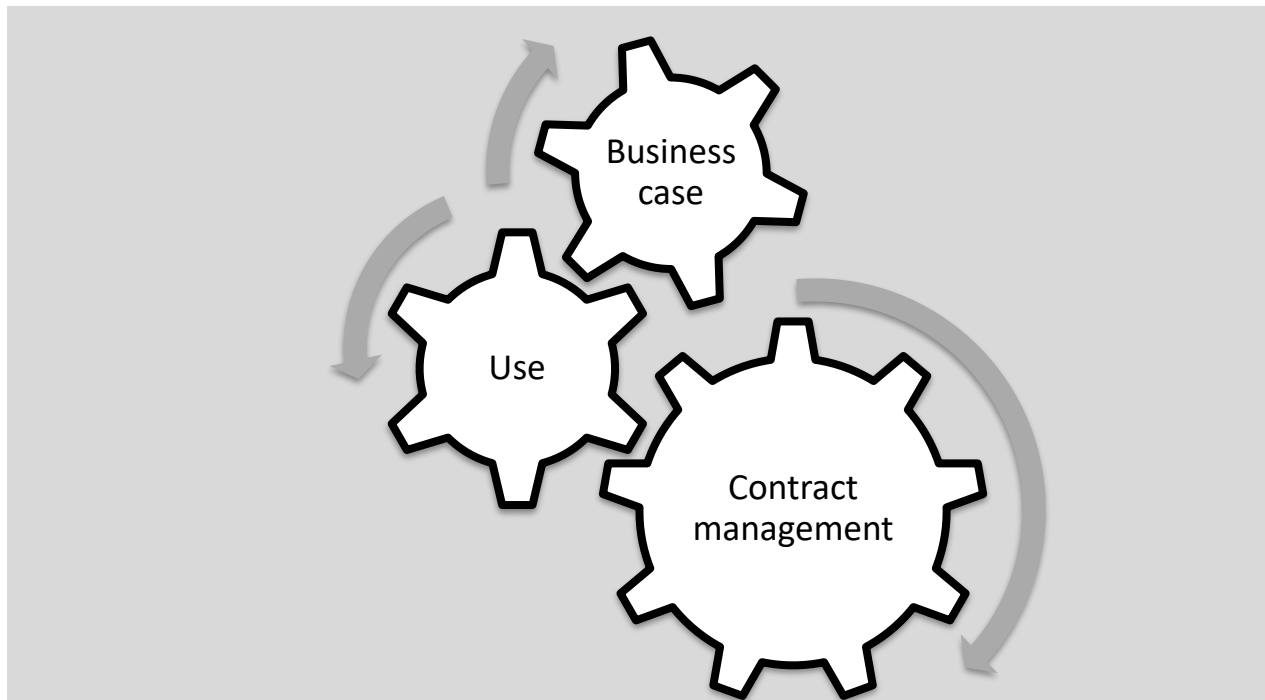
1. **Evaluate.** Evaluate with staff and stakeholders how far the health supply chain in your area currently meets environmental standards and social needs.
2. **Discuss.** Conduct a regular dialogue with staff and stakeholders to improve your ability to anticipate and react to economic, social, environmental, and regulatory changes as they arise.
3. **Innovate.** Encourage staff to view the health supply chain as a system of organisations, people, technology, activities, data, and funds than can be improved continually¹⁴.

¹⁴ UNICEF Innovation, UNFPA Innovation, Gates Foundation



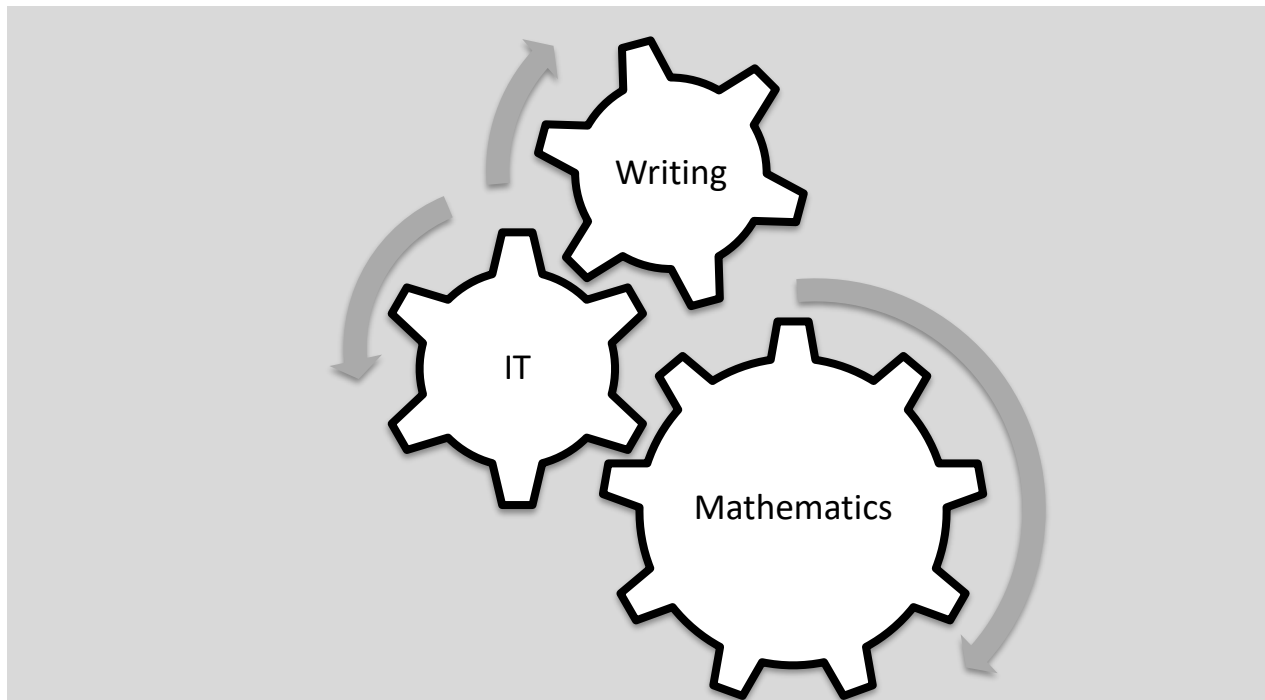
3 Tips for Using Information

1. **National information.** Develop your understanding of and utilise information and intelligence from the national medicines supply information system.
2. **Analytics.** Analyse logistics information to produce reports on the performance of the supply chain, and disseminate reports to stakeholders to generate possible improvement actions.
3. **Advocacy.** Utilize data and local information about the performance of the supply chain to build cases for funding and encourage donations.



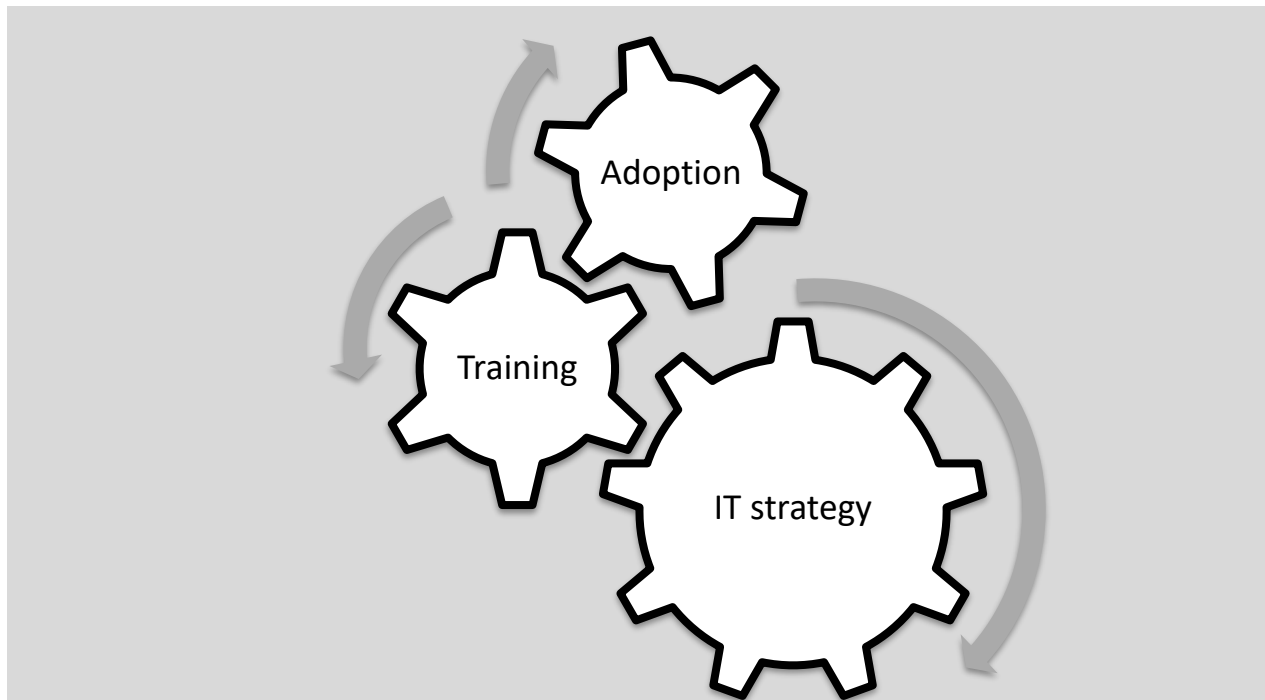
3 Tips for Outsourcing

1. **Business case.** Develop and share your understanding of the rationale and business case for using private suppliers and providers in the supply chain.
2. **Use.** Carry out an analysis of the different points of the supply chain, and determine points that are a good fit for outsourcing.
3. **Contract management.** Stay close to new suppliers until you are confident that they understand and are going to meet your standards and targets.



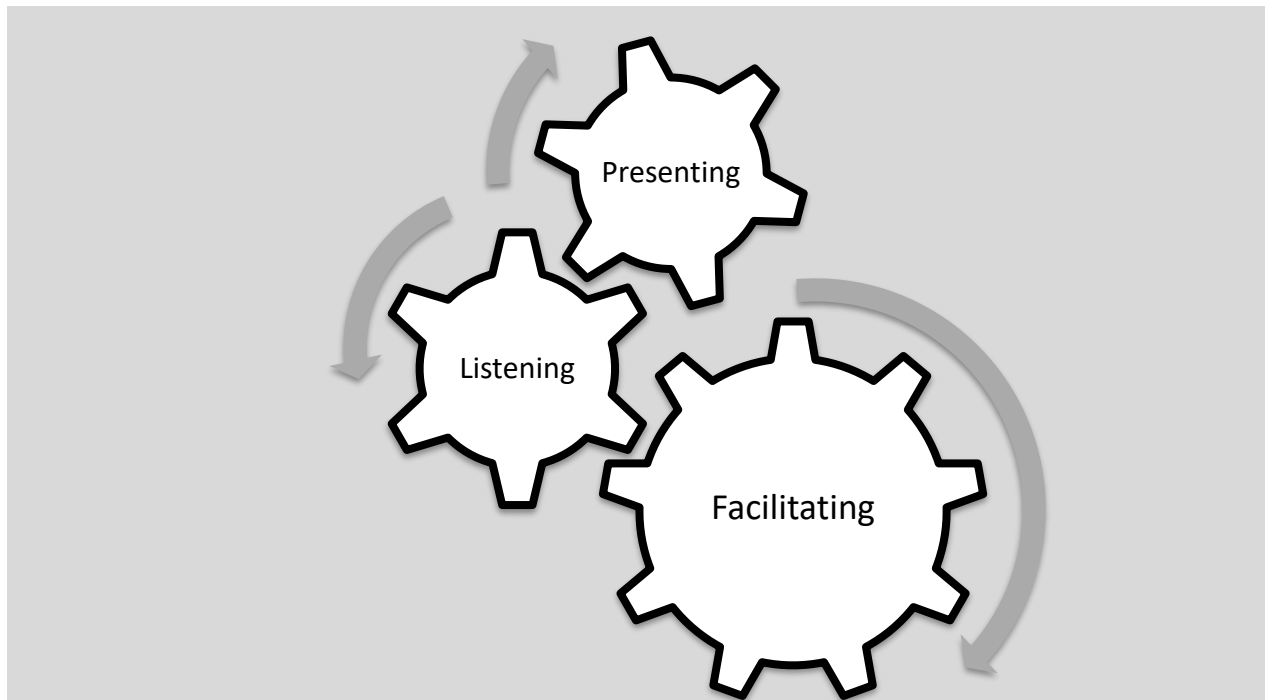
3 Tips for **Literacy and Numeracy**

1. **Writing.** Demonstrate ability to formulate and communicate information, ideas and opinions clearly and concisely to direct reports, bosses, customers and stakeholders.
2. **Mathematics.** Develop real-world mathematics, analytics and numeracy skills required in HSC leadership positions.
3. **IT.** Develop office computer skills, for example, ability to use Internet, email, and conduct searches, as well as use everyday office programs such as word processor, spreadsheet, and slide presentation software.



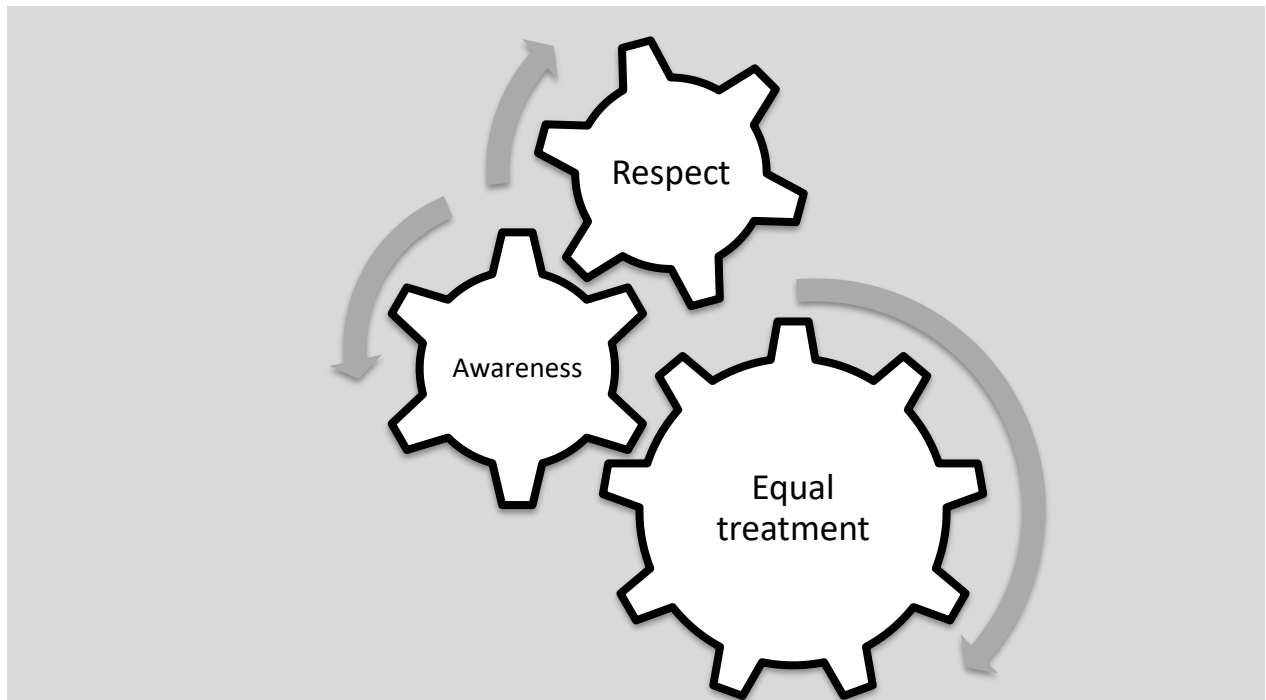
3 Tips for Using Technology

1. **IT strategy.** Develop strategy and plans for use of IT to assist in the delivery of health logistics and supply chain activities to maximise efficiency and effectiveness.
2. **Training.** Ensure that resources and support are provided across the organisation to enable colleagues to make the best use of the available technology.
3. **Adoption.** Keep abreast of new developments in IT and accelerate adoption of technology skills by encouraging team members who love new technology to lead adoption.



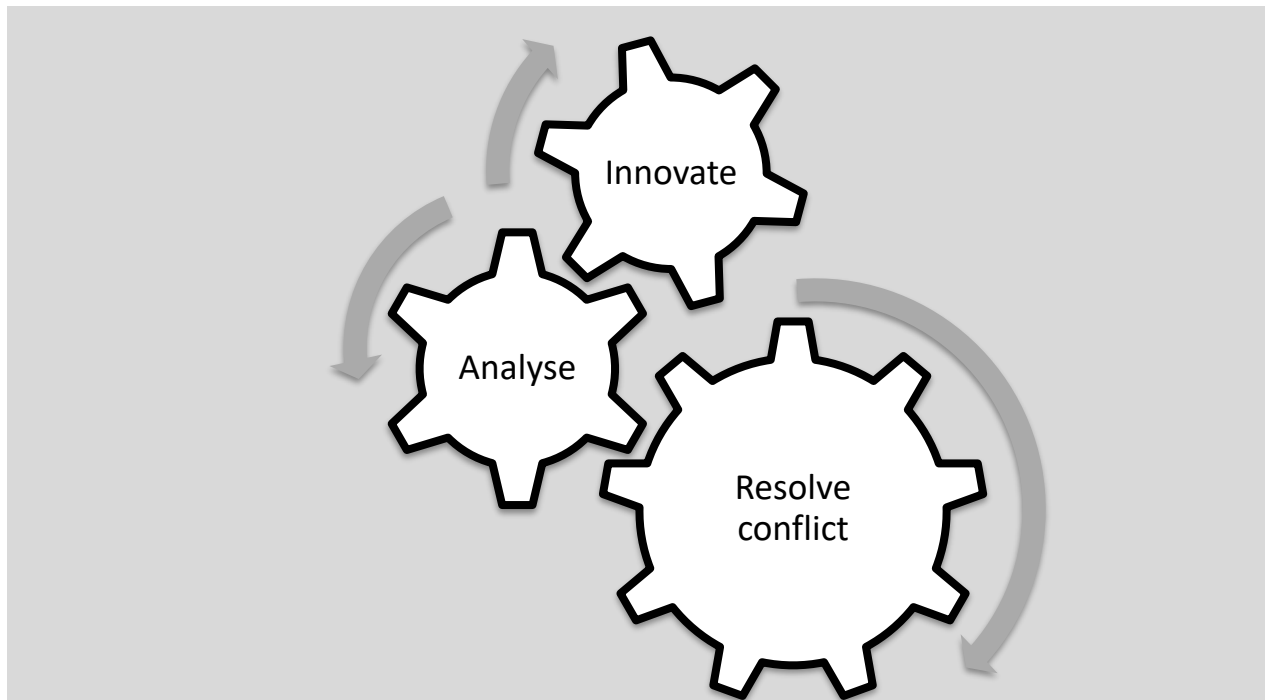
3 Tips for **Communicating**

1. **Presenting.** Develop public speaking and presenting skills by accepting opportunities to speak at meetings and conferences.
2. **Listening.** Develop listening skills by paying attention well, seeking mutual understanding, and encouraging information sharing.
3. **Facilitating.** Facilitate team and stakeholder meetings to help participants express views and opinions constructively and to steer participants towards agreed positions and outcomes.



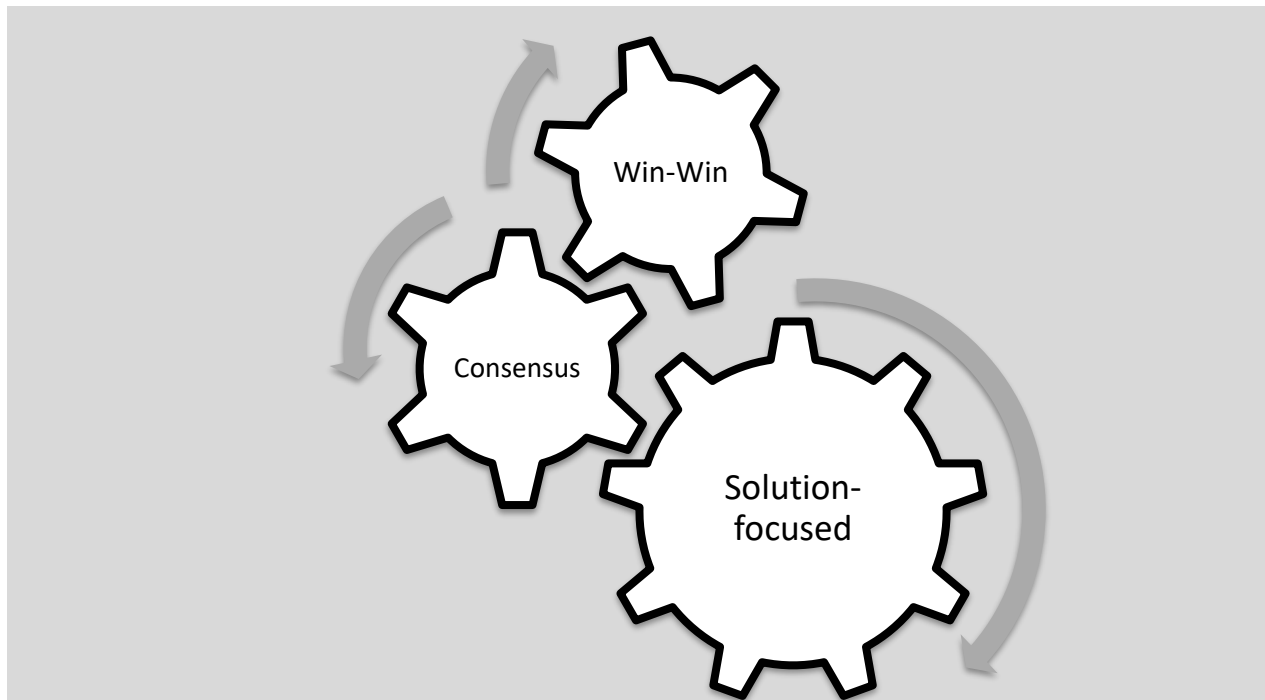
3 Tips for Cultural Awareness

1. **Awareness.** Promote cultural awareness and sensitivity treating all people with fairness, respect and dignity.
2. **Respect.** Respect the values, beliefs and cultural backgrounds of consumers that may influence the way services are provided.
3. **Equal treatment.** Ensure that you treat all employees equally, and implement anti-discriminatory practices within the organisation including HR and disciplinary procedures.



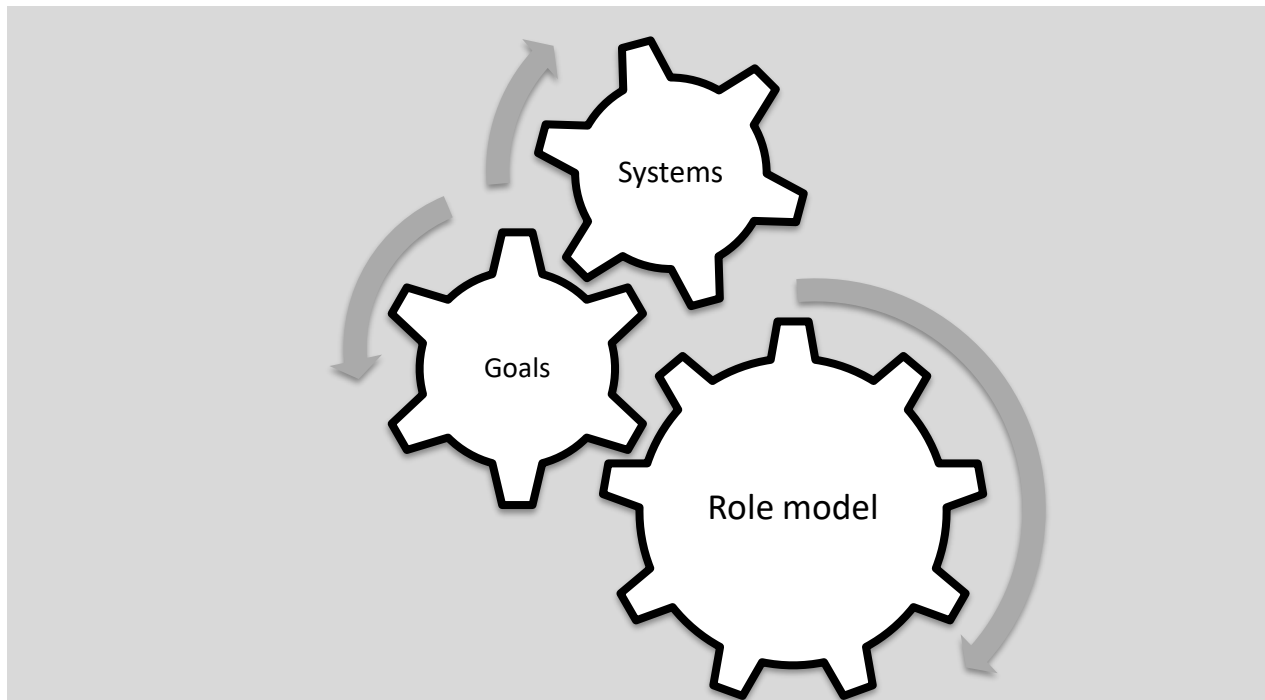
3 Tips for Problem Solving

1. **Analyse.** Commit to using analytics to analyse, synthesize, review and interpret information systematically and rigorously.
2. **Innovate.** Encourage your team to seek out fresh ideas from a wide variety of sources, entertain original solutions to problems, and generate new ideas.
3. **Resolve conflict.** Spot potential conflict, bring disagreements into the open, and help deescalate using appropriate approaches, for example, negotiation, collaborative problem-solving, mediation, arbitration etc.



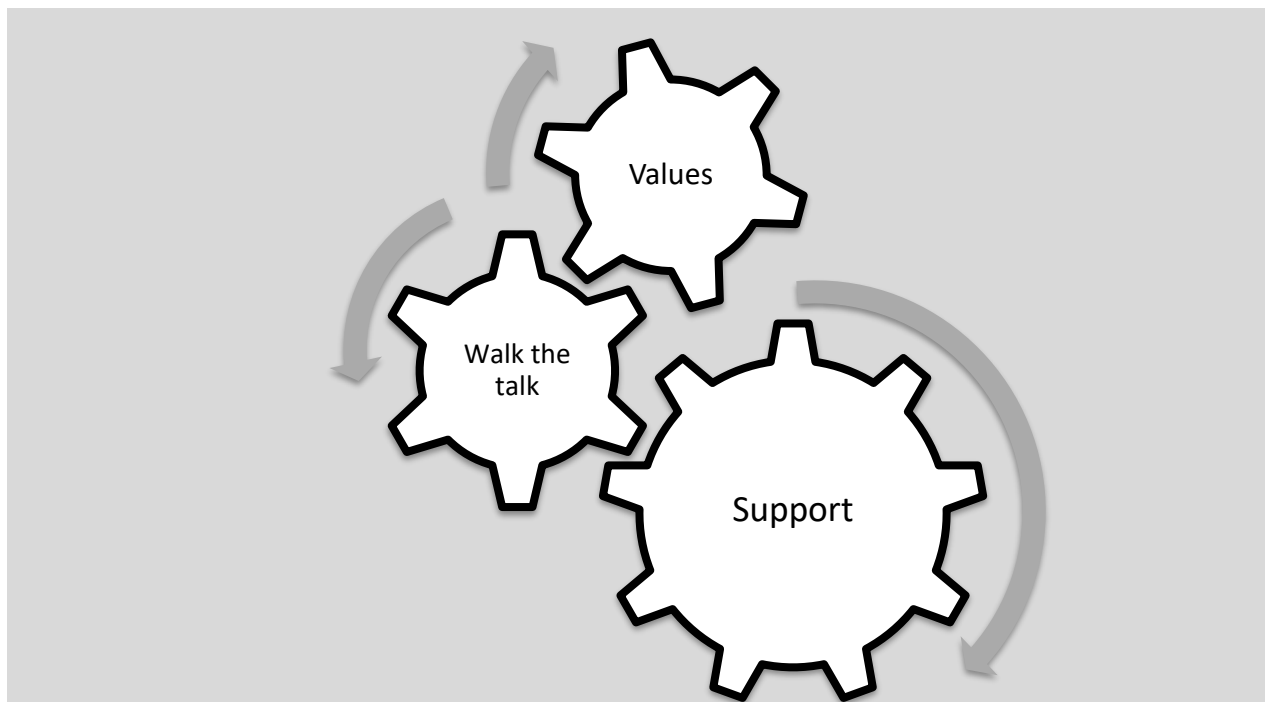
3 Tips for Negotiating

1. **Win-Win.** Gather key people together to negotiate agreements and aim for *win-win* outcomes.
2. **Consensus.** Build consensus among parties by addressing the priorities and concerns of individuals and groups you are seeking to influence, and adapting your negotiating style to cultural differences.
3. **Solution-focused.** Present or propose alternative ways of doing things to others, and model solution-focused approaches to further the mission of the organization.



3 Tips for Managing Time

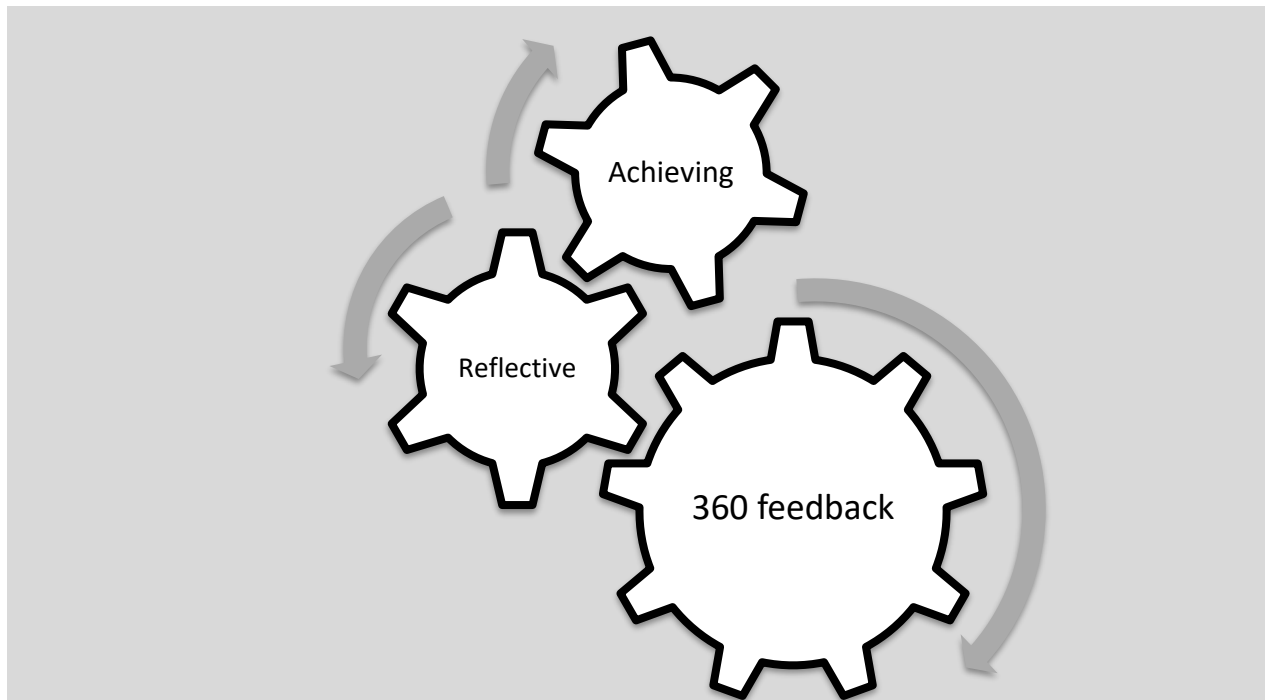
1. **Role model.** Demonstrate good practice through the way you manage your own time, for example, setting goals, meeting targets, keeping to deadlines etc.
2. **Goals.** Encourage team members to use goals to prioritize their daily work and gauge their progress. Encourage people to focus on identifying the right things to do and doing them.
3. **Systems.** Develop and use systems to organise and plan your own and other people's workloads. Track how long it takes to complete tasks to understand where people are spending too much time and where you need to reallocate time/tasks to achieve goals.



3 Tips for Acting Ethically

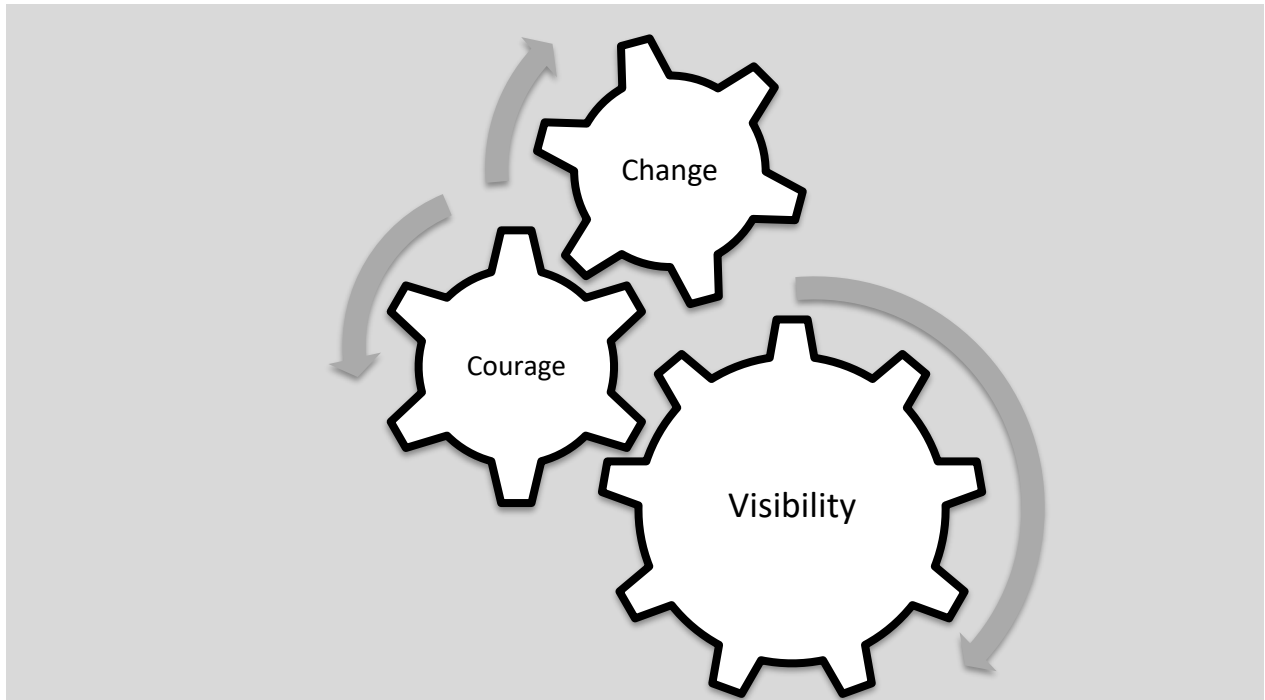
1. **Support.** Hold team discussions about ethical issues and challenges so people are clear about what is expected of them, and know they will get support maintaining ethical positions.
2. **Walk the talk.** Model the behaviour you want to see from others showing consistency between the principles you express and the behaviours you exhibit.
3. **Values.** Incorporate principles, values and ethics in policy development, and promote transparency¹⁵ in decision making structures and processes.

¹⁵ Measuring Transparency in the Public Pharmaceutical Sector - Assessment Instrument (WHO 2009)



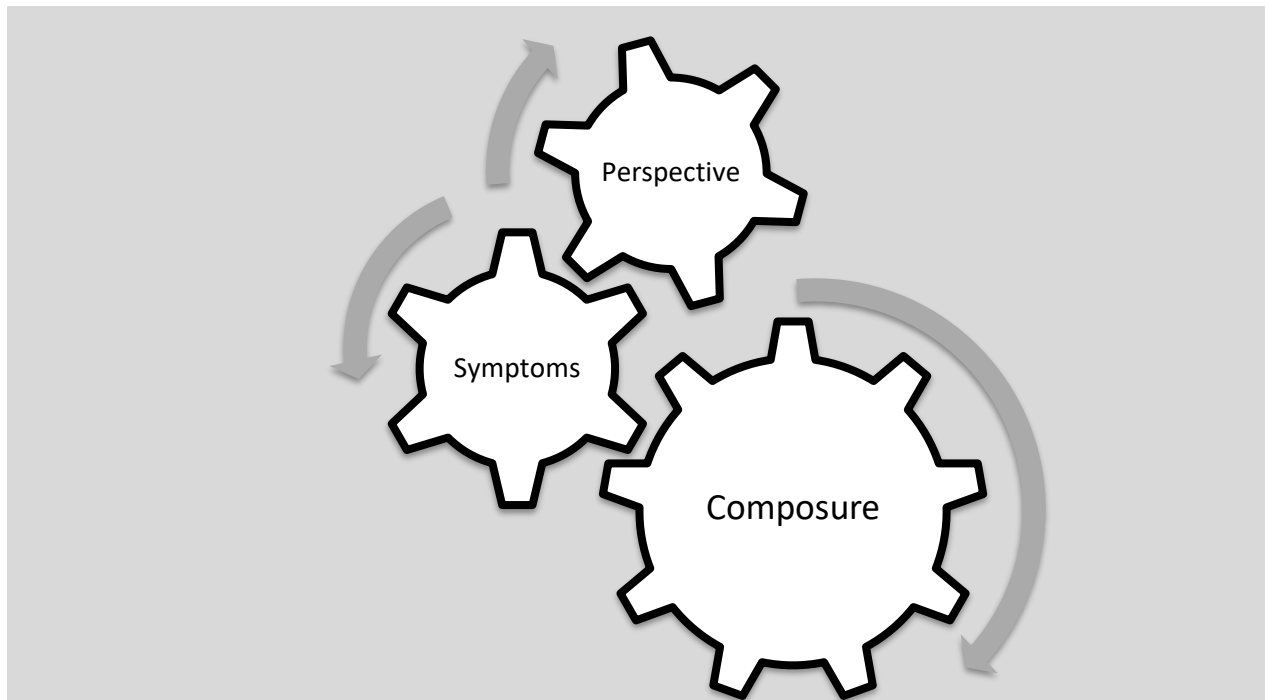
3 Tips for **Learning**

1. **Achieving.** Set ambitious goals for yourself and for people who work for you. Look for opportunities to acquire new knowledge and skills in work tasks.
2. **Reflective.** Show that you are open to new ideas and different perspectives. Employ reflective learning within the team where lessons are captured and integrated into future projects.
3. **360 feedback.** Ask the team for feedback on your management style and skills, and do a 360-feedback survey to find out how other people see you and what it feels like to work for you.



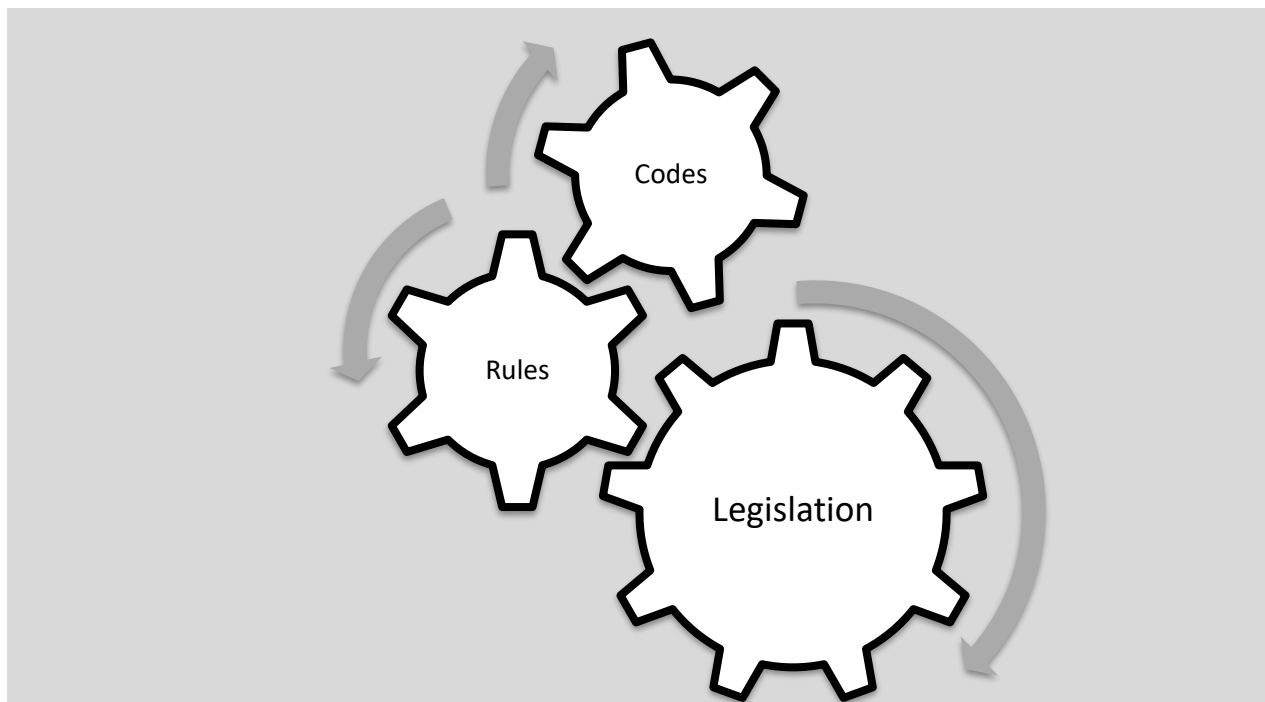
3 Tips for **Leading**

1. **Visibility.** Be visible and accessible by visiting different parts of the organization and supply chain, managing politics and power relationships, hosting meetings, conferences and events etc.
2. **Change.** Develop a compelling vision for the team to work to driving change and improvement, and developing opportunities for the organization and the sector.
3. **Courage.** When you have to deliver bad news, tell people in a straightforward manner what they need to know.



3 Tips for Managing Stress

1. **Composure.** Encourage the team to be composed, relaxed and professional in open work places.
2. **Symptoms.** Learn about and watch for the warning signs of stress in yourself and your team. Take steps to identify causes, access support and reduce pressure.
3. **Perspective.** When under pressure, step back, get things in perspective, and if necessary develop a new plan.



3 Tips for Regulating

1. **Legislation.** Ensure that you comply with national legislation that covers the practice of public health supply chains and health care.
2. **Rules.** Develop and share your understanding of when and how to question existing rules and constructively seek change, for example, to improve processes, costs, efficiency, reduce risks etc.
3. **Codes.** Develop and share your understanding of the requirements of professional codes, guidelines and standards adopted as part of the legislative framework.

Leadership Development Plan

Goal	Development Activity	Progress Notes

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