

GiveWell Document Requests July 30, 2014

Overview of documents requested and what is included:

1. Past budgets

- A. Our 2014 Board approved budget.
- B. Our 2013 YE Financials, unaudited. This includes summary info for previous years.

2. List of products with information on margins at each level of the supply chain. (I will keep in mind that margins can change quickly and may vary by location.)

- A. Our consolidated product list (each country on separate tabs) including our purchase price, wholesales price, and retail prices.

3. Process document on how CHPs are selected.

We do not have a process document. But, I'm including a few relevant documents and we're happy to discuss the process further by phone as needed.

- A. CHP Interview Guide
- B. CHP Biographical Data Sheets
- C. CHP Test
- D. Draft Branch Management Manual. This covers CHP recruitment, criteria, training, and coaching.

4. Sales records by product.

- A. A raw report showing monthly sales by product in Kenya. Tabs included show sales in KSH and unit sales by product.
- B. A raw report showing monthly sales by product and by branch in Uganda. Tabs included show sales in UGS and unit sales by product.

5. Key metric reports, both from Living Goods and BRAC if possible, with any written information you have available on how these metrics are collected and analyzed.

- A. Our internal monthly sales dashboard. This report covers key sales and agent metrics that we use internally to manage our operations.
- B. Our internal monthly management health / impact dashboard. This report covers key health and impact metrics that we use internally to track our impact objectives.
- C. A quarterly dashboard that we put together for CIFF showing quarterly performance of both LG and BRAC on key performance indicators.
- D. 2012 YE Stakeholder Report which includes our YE performance dashboard.
- E. 2013 YE Stakeholder Report which includes our YE performance dashboard.

We do not have any one document that explicitly covers how our metrics are collected and analyzed. We are happy to connect you with our Director of Analytics to discuss by phone and/or pull something together if needed. Please note a few assumptions/definitions have changed over time. We constantly refine our definitions/assumptions/systems to make them as accurate as possible. For example, in previous years, we believed that each CHP served approximately 150 households so we used that number when calculating population served. We now use a more conservative estimate of 100 households per CHP. Let us know if you feel you need clarification and/or historical context on any of our metrics.

6. Results of correlation analysis used to determine whether CHP reports are accurate.

- A. A report that we produce monthly showing the correlation between our agent reported impact figures and sales of corresponding products. This helps us ensure that our reported impact figures are accurate and in-line with expected sales. Note that:
- Dosage levels vary by age of patient, so our mapping of sales to treatments, which is based on historical age of treatment data, is not expected to be completely accurate.
 - Second, agents often stock-up on key treatments, and as such, it is typical to see month to month fluctuations in sales and reported treatments. Over time, we want the figures to be approximately even, but expect that in any given month, we may be above or below 100%.

7. Any other information on program performance. We would be very interested in seeing results from randomized follow-ups and field visits, though my understanding from our conversation that this information does not exist in a written form.

See Branch Management Manual, 3D. Also note field staff conducts monthly field checks with CHPs that focus on (1) following up on outliers, and (2) comparing sales vs. treatments and observations of activities. This process is still being formalized and as such, is not explicitly documented, but we are happy to discuss with you further.

8. Any data on CHP dropout rates and profitability.

The materials included above cover this.