# Trainer's Guide

# Health Service Management

## Learning Materials — Volume I

PLAN

IMPLEMENT

Task

Group

Individual

CONTROL

# CONTENTS

## Foreword

The Integrated Rural Health and Family Planning (IRH/FP) project is one of the priority undertakings of the Ministry of Health. One of the components of the IRH/FP project is 'Strengthening the Managerial Performance of District/sub-District Health Management Teams' (HMTs). During the implementation of this project component the Administrative Support Unit (ASU) in the Ministry of Health (MOH) – in co-ooperation with the African Medical and Research Foundation (AMREF) – spent much effort on consolidating, editing and publishing the learning materials on problem-preventing/solving and health management in a manual called Health Service Management: Learning Materials – Volume I.

At the beginning of 1985 a MOH/AMREF/Swedish International Development Agency (SIDA) team carried out an evaluation to analyse the experience gained so far in the actual implementation of this projecta component and to suggest alternative interventions to strengthen the managerial perforamance of health management teams. Prior to this evaluation, MOH/AMREF conducted an internal evaluation which provided information for the final evaluation.

The main recommendation of the evaluation report reads as follows:

> "Management development programmes tend to be long-term processes. Despite the relatively short period of time – less than three years – the programme 'Strengthening the Managerial Performance of HMTs' has been very encouraging in terms of learning results and impact at work. Therefore, the evaluation team strongly recommends that the programme continue during thea second phase of the IRH/FP project."

Concerning training-related interventions the evaluation reports states:

> "The learning materials on problem-preventing/solving and health management have been consolidated, edited and published in a MOH/AMREF Manual Health Service Management: Learning Materials – Volume I. This volume should be complemented by a Teachers' Guide to facilitate the use of the manual, both in basic training at the Department of Community Health, at the MTC and in continuing education at the MOH/Hqs, provincial, district and RHU levels."

In response to this recommendation the ASU, together with AMREF, started preliminary work on the Trainer's Guide in April 1985. The main task of developing the guide was carried out by participants of a Working Seminar on Trainer's Guide Development which took place in Coast Province from 9 to 11 July 1985. The members of the writing team included:

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The Trainer's Guide does not provide strict rules of how to organize an
conduct training activities in health managemeant; as the title of this
publication implies, the writing team put together some guides and
suggestions derived from their vast experience in health managemeant
taining.  Thus, the Trainer's Guide aims at facilitating your task as a
trainer in health management and the use of the learning materials in the
manual Health Service Management: Learning Materials - Volume I.

<div align="right">
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**Introduction**

The purposes of this introduction are:

(a)  To explain the modular approach and thea framework of the learning materials;

(b)  To demonstrate:

- how to use the learning materials and to adapt them to particular conditions;
- how to select the most effective training methods and techniques;
- how to organize health manageameant training activities.


1.  <u>Modular Approach, Content</u>

The learning materials are structured as modules. Each module aims at strengthening knowledge of and skills in a specific managerial duty, ranging from problem-preventing/solving to guidance and supervision. Each module stands on its own and has its educational objectives, reading material and exercises.

The learning modules are grouped into two parts as shown below:

| Part | Module No. | Content |
|------|-----------|---------|
| **Part A:** Problem-preventing/ Solving | 1. | Integrated Rural Health and Family Planning Programme |
| | 2. | Functions and Composition of Your Health Management Team |
| | 3. | Identification of Problems |
| | 4. | Problem-preventing/Solving |
| | 5. | Introducing Change |
| | 6. | Decision-Making |
| | 7. | Problem-preventing/Solving at Your Station |
| **Part B:** Health Management | 8. | Principles of Management |
| | 9. | Health as Part of Socio-economic Development |
| | 10. | Group Working |
| | 11. | Organization and Co-ordination |
| | 12. | Communication |
| | 13. | Motivation |
| | 14. | Perception and Self-development |
| | 15. | Delegation |
| | 16. | Guidance and Supervision |
| | 17. | Leadership Behaviour |
| | 18. | Management of Hospital Outpatient Services (OPS) |
| | 19. | Forthcoming Problem-preventing/ Solving Activities at Your Station |

## 2. Tailor-made Training Package

As a trainer, you will have to select the learning modules and adapt them to your training needs without losing the advantages and benefits which the different modules offer, namely:

- universality: they can be used in many kinds of conditions;
- completeness: they cover almost all management functions of Health Management Teams (HMTs);
- flexibility : they can easily and quickly be adapted to specific training needs;
- low cost : since they are easily adaptable you do not have to start from scratch with the laborious and costly design of a totally new training programme.

In selecting and designing the tailor-made package you as a trainer will go through the following process:

(1) learn and understand the modular approach and content;
(2) identify the training needs;
(3) in accordance with the training needs, choose the right set of modules and determine the sequence, e.g. module 10 can be included in Part A.
(4) adjust the set of modules selected to the training needs and make up your own training package. This may include: modifying the module's objectives; re-writing some of the reading materials; and replacing the exercises with your own, taken from your own experiences and adapted as necessary.

## 3. Workshop Approach

The main didactic method should be the workshop approach. It is the principle of this approach that those attending are not students in the usual sense but active participants. This method puts great emphasis on active participation by those attending the training activity. The aim is to help participants to learn by doing and exchanging experiences, including solving problems by group work in practical exercises. A more detailed description of the workshop approach is given in the manual Health Service Management: Learning Materials - Volume I, pp. 4-6.

Various training methods can be applied. The training method will vary depending on the nature of the subject to be studied. Traditional methods, such as lecturing, are used to convey facts and knowledge. Discussion leading, homework, individual and group exercises, are adopted if the emphasis of training is on the development of attitudes and skills.

A comparison of the main training techniques is given in Appendix A.

## 4. Visual Aids

During the training activity the trainers will be trying to: convey

facts and ideas; develop understanding and insight; and impart skills. It is important to get through with visual illustrations as well as words, in order to consolidate the learning process. Where not provided for, equipment for visual aids should be borrowed from any available source.

## Blackboard or Flipchart

Ensure that a blackboard and/or flipchart are available. They should be positioned in good light, and clearly visible. Be sure to write in large enough letters for people at the back to be able to see. Do not speak whilst you are writing. Do not crowd your board or chart and, if possible, plan beforehand how and when you are going to use it.

The flipchart is better than the blackboard because:

i.   you can prepare it beforehand;
ii.  you can refer back to earlier points;
iii. it does not have to be cleaned - you just turn the page;
iv.  participants do not have the feeling that they have gone back to school.

## Overhead Projector

Participants like to see that some thought and preparation have gone into the session and you may have a number of diagrams, graphs, etc., which can be prepared on transparencies for use on the overhead projector.

## Films and Slides

Always preview any film which you propose to use in your session. At the preview, make notes so that you can review the film in discussion with the workshop participants after the showing.

Prior to showing the film or slides, tell the participants what they are about and what to notice or identify.

After the show have a discussion about its main points. Training films are always more meaningful when you discuss them with the workshop participants afterwards. Use a discussion in plenary, or groups with reporting - back in plenary.

<u>Seating Arrangement (including Visual Aids</u>

The following arrangement for visual aids is recommended:

CINE/SLIDE PROJECTOR

OVERHEAD PROJECTOR

FLIP CHART
OR BLACKBOARD

SCREEN
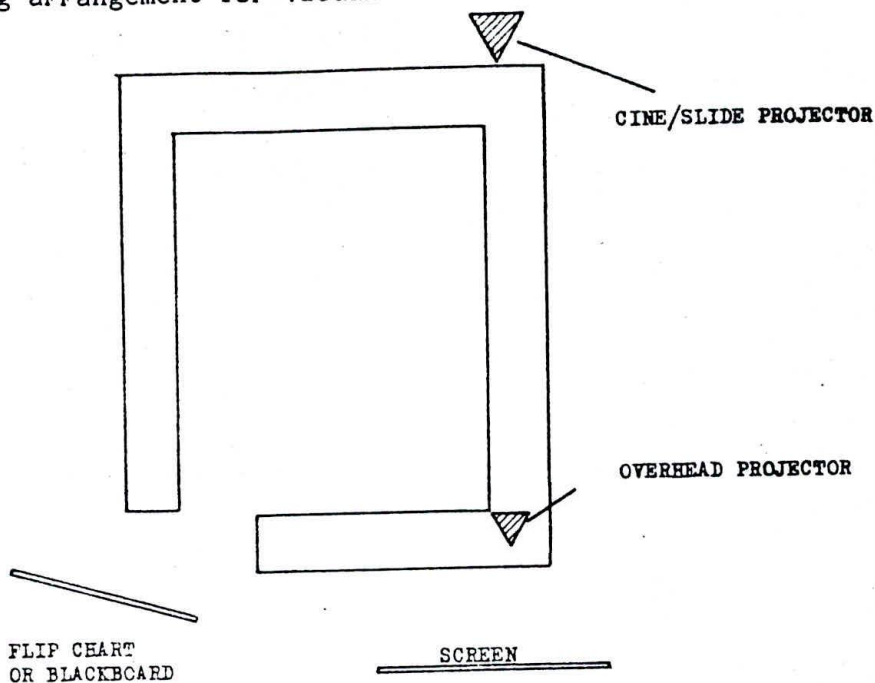
## 5.  <u>**Workshop** Planning and Organisation</u>

<u>Scheduling the Workshop</u>

Examples of obvious times to avoid when scheduling your workshop are holiday periods and periods of peak workload.

<u>Choosing a Good Venue</u>

Participants attending a workshop may have a number of work pre-occupations or possibly domestic or personal problems. It helps if you can get them away from their workplace into a hotel or training centre where they cannot be too easily disturbed.

It is very important to have all the facilities - training facilities, accommodation and board - 'under one roof'. Frequently, you have to select the 'best' venue amongst competing facilities. The method 'Setting priorities by means of selected criteria' will help you in making a rational decision (see Appendix B).

<u>Inviting the Participants</u>

You will invite the participants in good time - some three to four weeks prior to the workshop - and provide in writing all the information on: i. background; ii. objectives of the workshop; iii. working approach; iv. agenda; v. participants; vi. venue; vii. dates; viii. and most important, any preparatory work to be carried out by the workshop participants (see Appendix C).  A follow-up should be made by telephone to confirm participation.

What is the number of participants? Experience shows that some 24 to 32 participants is good number. Avoid mammoth workshops with more than 40 participants; they are hardly manageable and not at all cost-effective.

## 6. Budgeting for the Workshop

Trainers should make a budget for the workshop. Budget line items may include: i. Full board for participants and facilitators; ii. Learning materials, e.g. books, films; iii. Stationery; iv. Consultancy fees for trainers; v. Transport; vi. Conference facilities; vii. Miscellaneous.

## 7. Conducting the Workshop

Participants will spend a lot of time on doing group work. Trainers should ensure that a good composition of participants exists in each group, e.g. one medical doctor in each group. Depending on the group assignment the participants will be grouped as HMTs.

Trainers should explain the exercises clearly. They should provide guidance to the groups in doing the exercises but avoid unnecessary interference.

Trainers should also inform and agree with participants on the homework which must be done in preparation for the sessions on the following day.

## 8. Evaluation

As part of the preparatory work the trainer will develop an evaluation questionnaire (see illustrations in the Manual Health Service Management: Learning Materials, Volume I, pp. 75-78 and pp.307-310).

In addition to this evaluation questionnaire thea trainer should have a daily informal evaluation (see p. 5 of Manual). This daily evaluation will include a trainers' meeting with representatives of participants.

Based on past experience it is suggested that you share the evaluation results with the participants before the workshop is closed. Trainers should be aware that the compilation of some 30 individual evaluation questionnaires may take 1.5 person hours, i.e. two persons would have to spend some 45 minutes to make the compilation.

## Opening Session

### General

Should you have a rather informal opening session or a very formal one?
There is no ready-made answer; local circumstances and your personal
preference will guide you in making your decision. In case you opt for
a more informal opening of the workshop you may start the session by you,
your co-trainers and the participans introducing themselves.

You may wish to conduct a more formal opening session with a prominent
speaker, e.g. the Provincial or District Commissioner or a highly placed
official from the Ministry of Health headquarters. Prominent speakers are
often not availble early in the morning. Thus, you may schedule the opening
session for 10.00 a.m., for example, and start the workshop with the
introductory session at 9.00 a.m.

Have in mind that some speakers appreciate a draft speech prepared by you as
trainer. Consult with the guest speaker whether he needs briefing notes or
a written speech.

Occasionally, prominent speakers are delayed. Do not wait for them for
hours. If they are delayed by more than 15 minutes start with the next
session. As soon as they arrive you can interrupt the on-going session.

Timing:   approximately 30 minutes

## Introductory Session

### General

This session is most crucial since it helps to set the right climate for the workshop.

### Timing: some 45 minutes

### Process

| Step | Visuals | Comments |
|---|---|---|
| 1. a. Organizers, trainers and participants introduce themselves; e.g.<br>   - educational background<br>   - professional background<br>   - present work station and position<br>   - civil status<br>   - special interests<br><br>  b. Apologies (e.g. for non arrivals) | - name tags | - risking become monotonous<br>- most likely that you have to ask participants to speak up<br>- introduction should be very informal |
| 2. Trainer discusses and agrees with participants on workshop objectives<br>  - refer to briefing notes<br>  - invite one of the participants to read the objectives<br>  - ask for comments<br>  - adjust the objectives if necessary<br>  - summarize | - workshop objectives as suggested in the briefing notes<br>- objectives with modification | |

| Step | Visuals | Comments |
|------|---------|----------|
| 3. Trainer discusses and agrees with participants on the learning approach<br>   - together with the participants determine the approx. number of person years of professional experience available in this conference room<br>   - introduce the concepts of traditional teaching approach versus the workshop approach<br>   - agree on the learning method (preferably the workshop approach) | | - one-way communication: teacher and participants<br>- with 27 participants and 3 trainers some 360 person years of professional experience (30 x approx. 12)<br>- communication pattern in which all participants and trainers are involved |
| 4. Trainer introduces and agrees with participants on agenda (refer to the briefing notes) | | |
| 5. Discussion on administrative matters including;<br>   - accommodation<br>   - meals and drinks<br>   - telephone<br>   - laundry<br>   - reimbursement of transport expenses<br>   - recreation facilities | | |

## Module 1: Integrated Rural Health and Family Planning Programme
### (pp. 12-20 of Manual*)

### General

The trainer should be conversant waith this programme, particularly with its implementation.

Timing:   some 75 minutes

### Process

Usually the whole session will take place in plenary.  Depending on the session objectives, group work may be included.

| Step | Visuals | Comments |
|------|---------|----------|
| 1. Trainer introduces session objectives | | |
| 2. Talk and discussion on IRH/FP project<br>- evolution<br>- programme concept and objectives<br>- programme description<br>- status of implementation<br>- constraints | - programme objectives (pp.12,13)<br>- components of Part B (pp.14-16) | information on implementation in relevant progress reports |
| 3. Talk and discussion on Strengthening the Managerial Performance of HMTs<br>- evolution<br>- situation analysis<br>- strategy<br>- status of implementation<br>- constraints | strategy model (figure 1., p.19) | information on implementation in relevant progress reports |

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*All page reference in this Guide refer to the Health Service Management: Learning Materials - Volume I manual.

## Module 2: Functions and Composition of your Health Management Team
### (pp. 21-26)

### General

In the invitation letter to the participants - Briefing notes - you may have asked the participants to do some work in preparation for this session, e.g. to identify functions and composition of a District Health Management Team.

### Timing: 75 minutes

### Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. (a) Trainer explains the exercises 1.,2, and 3. (pp. 21,22) | | reading materials 1. and 2. (pp. 23-26) are illustrations |
| (b) Participants split into their teams and develop solutions to the three exercises in their teams | | |
| (c) The teams present their solutions in plenary | | |
| 3. Trainer and participants draw conclusions and compare them with reading material 2 (pp. 25,26) | main conclusions | conclusions may include: <br> - functions identified by teams are more or less the same <br> - many functions are managerial in nature <br> - technical functions frequently have a managerial aspect |
| 4. Group rapporteurs may prepare a summary of the teams' presentations and conclusions | | alternatively, each team presentation should be typed and reproduced |

# Module 3: Identification of Problems (p. 27)

## General

In addition to the two session objectives, as described in the manual, this session aims at helping the participants to recognize that many problems which they face are managerial in nature, or at least have a managerial aspect.

Timing: 60-90 minutes

## Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. (a) Trainer invites participants to write down on a sheet of paper 3 important problems they face in carrying out their duties | | - alternatively, participants could identify important problems in groups<br>- trainer to prepare layout prior to session |
| (b) Each participant reads his/her problems | see note on layout on the following page | trainer to encourage participants to read their problems from sheet of paper and not to refer to the problems already listed on the blackboard/flipchart |
| (c) Trainer writes each problem and frequency on blackboard/flipchart | see note on layout | |
| (d) Trainer and participants determine priorities in terms of frequency | see note on layout | |
| (e) Trainer and participants indicate whether each problem is of a resource or non-resource (managerial) nature | see note on layout | problems which at a first glance seem to be only of a resource nature often also have a managerial aspect |

14

| Step | Visuals | Comments |
| --- | --- | --- |

3. Trainer and participants
   draw conclusions:
   number of problems of a
   resource nature, non-resource
   nature and of both resource
   and non-resource nature

Note of Layout

| Problems | Frequency | Priority | Nature | |
|---|---|---|---|---|
| | | | Resource | Non-resource |
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| Total | | | | |

# Module 4: Problodem-preventing/Solving (pp. 29-42)

## General

This is a crucial session since it aims at initiating the process of problem-preventing/solving at the participants' health stations.

Timing: some 120 minutes (time to be extended if necessary)

## Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. As part of their homework participants study the paper 'Probloem-preventing/solving' in preparation for this session (pp.31-38) | | |
| 2. Trainer introduces session objectives | | trainer to note that this session will be continued in module 7 (pp.73,74) |
| 3. Trainer invites one or two of the participants to read aloud the 'Calf Path' story (pp. 39-41) | | for trainer: see step 5.(c) for lessons to be derived from story |
| 4. (a) Trainer introduces the exercise 3. 'The Fly' (p. 42) | | for trainer: see ste 5. (c) for lessons to be derived from the exercise |
| (b) Each participant does the exercise individually in plenary | | |

17

| Step | Visuals | Comments |
|------|---------|----------|
| (c) Trainer and participants illustrate how to find the solution | using blackboard/ flipchart | solution: 40 miles. It is important to structure the information of the story, e.g. i. distance between the 2 cyclists; ii. speed of the 2 cyclists; iii. speed of the fly. Question: How much time does it take for the 2 cyclists to collide? Answer: 1 hour. Question: What is the distance the fly covers during 1 hour? Answer: 40 miles. |
| 5. (a) Trainer introduces the Exercises 1,2,4,5, 6, and 7 (p. 30) | | - in doing the exercises 1,5,6, and 7 participants should refer to the paper 'Problem-preventing/ Solving' <br> - participants should be concerned with the time available. Approx. 40% of the total time may be spent on exercise 1. |
| (b) Participants split into groups and do exercises | | trainer and co-trainers provide guidance |

| Step | Visuals | Comments |
| --- | --- | --- |
| (c) Groups report their findings in plenary | | |
|     - all groups report first on Exercise 1. Trainer and participants draw conclusions | problem-preventing/ solving steps (figure 1., p. 32) | |
|     - same procedure used in Exercise 1 to be followed on the reporting of Exercise 2,4,6 and 7. | | lessons too be derived from Exercise 2: <br> - we follow our daily routines <br> - many roads lead to Rome <br> - use your imagination to explore new avenues <br> lessons to be derived from Exercise 3: <br> - do not panic when confronted with a new problem <br> - structure the information available in order to arrive at a solution easily |

Module 5: Introducing Change (pp. 43-47)

General

Preventing and solving problems often imples changes. Most people resist change. This session discusses ways in which people can be helped to accept change.

Timing: some 60 minutes

| Process Steps | Visuals | Comment |
|---|---|---|
| 1. Preferably, participants will read the paper 'Introducing Change' (pp. 45-47) as part of their homework in preparation for this session | | |
| 2. Trainer introduces session objectives | | |
| 3. Participants do Exercise 1 (a) and (b) (pp. 43,44) in plenary with the guidance of the trainer | using blackboard/ flipchart | |
| 4. (a) Trainer introduces Exercise 2 and 3 (p. 44) | | trainer to invite the participants to refer to reading material 'Introducing Change' (pp. 45-47) |
| (b) Participants split into groups and do the exercises | | trainer to refer to 'Calf Path' story (pp. 39-41) |
| (c) Groups report on their findings in plenary | | |
| 5. Trainer and participants draw conclusions | | |

## Module 6: Decision-making (pp. 49-71)

### General

Decision-making is an essential part of most managerial activities and it is particularly important in problem-solving. The session aims at improving participants' decision-making skills and discussing a systematic approach to decision-making including the importance of consultation.

**Timing:** 135-150 minutes

### Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. Trainer introduces Exercise 6 (a) (pp. 69,70) and invites participants to try out their own decision-making skills | | - time for exercise approx. 10 minutes<br>- trainer to emphasize that the exercise is not a 'test', but is intended to put participants in a decision-making frame of mind. Participants are usually hesitant and need encouragement to make the various decisions |
| 3. Trainer leads discussion with participants on what is a decision? Why do we make decisions? Why is decision-making difficult? (pp. 51,52) | | |
| 4. (a) Trainer explains the 5 different kinds of action involved when making a decision | 5 actions (pp. 52,53) | |
| (b) Trainer introduces Exercise 1 (p. 66) | | |
| (c) Participants do exercise individually in plenary | | approx. 10 minutes |

| Step | Visuals | Comments |
|---|---|---|

(d) Trainer and participants discuss answers

answers: (p. 66)
1. Adaptive 2. Contingency
3. Corrective 4. Interim
5. Corrective 6. Contingency
7. Interim 8. Adaptive/
                Preventive

5. Trainer outlines the 5 main stages of decision-making

5 main stages (see p. 13, Suggested Procedure p. 14)

the 5 stages are important and will be referred to throughout the session

6. (a) Trainer explains in detail the nature of 'Decisions, Decisions' and asks participants to identify for themselves the 5 stages of decision-making as illustrated by the film

see pp. 53,54

trainer to explain the film in detail prior to showing and ensure that participants are familiar with the various characters in the film to illustrate the 5 stages of decision-making

(b) Trainer shows film

- film time: 30 minutes
- 'Decisions, Decisions' available from KIA, AMREF or Manplan Consultancy Services, Nairobi

(c) Trainer uses the film as a reference point for discussion with participants on each of the 5 stages of decision-making

7. (a) Trainer and participants discuss stage 1 'Fact Gathering' (pp. 55,56)

(b) Trainer introduces Exercise 3 (p. 57)

(c) Participants do the exercise individually in plenary

(d) Trainer and participants draw conclusions on Exercise 3

trainer to emphasize the importance of clarifying the objectieves at the start of the decision-making process

| Step | Visuals | Comments |
|---|---|---|
| 8. Trainer and participants discuss stage 2 'Consulting People' (p. 56) | | trainer to emphasize benefits of consultation |
| 9. (a) Trainer introduces Exercise 5 (p. 68) | | - optional<br>- trainer to hand out form Exercise 5 'Must' and 'Wants' Factors (p. 68)<br>- trainer to explain that he is introducing his own personal criteria for purchasing a car<br>- participants to fill in answers as follows:<br>1. Must 2. Must 3. Must<br>4. Want 5. Want 6. Must<br>7. Must 8. Must 9. Want |
| (b) Trainer hands out blank decision-making forms | | these forms should be in format shown in Tables 1.,2. and 3. (pp. 58-60) |
| (c) Participants complete forms<br>- participants fill in the 'Must' and 'Want' constraints as per Exercise 5<br>- trainer provides details of cars A, B and C (see pp. 58-60) to be filled in by participants | | |
| (d) Participants decide which car to purchase | | correct answer: car B - the choice that complies with all the 'Must' constraints |
| (e) Trainer and participants summarize stage 3 'Making the Decision' (p. 57) | | |
| 10. Trainer continues with the discussion on Stage 4 'Communicating the Decision' and Stage 5 'Follow-up' (p. 61) | | trainer to make reference to the film |
| 11. Trainer leads discussion on ways of stimulating the generation of alternative courses of action (pp. 61-63) | | trainer may refer to 'Calf Path' story (pp. 39-41) |

| Step | Visuals | Comments |
|------|---------|----------|

**Step**

12. (a) Trainer and participants
continue to do Exercise
6 b (pp. 70,71)

**Visuals**

**Comments**

- participants to be
divided into 3 groups

- trainer to select a
leader from each group
- each leadear is assigned
to play one of the
following roles:
  (a) Autocrat;
  (b) Democrat;
  (c) Consensus
- trainer to brief leaders
on their different roles,
and to give them copies
of exercise 6 b (p. 71)
- it is very important that
the different roles are
not disclosed to the
groups
roles:

(a) - the Autocratic leader is
instructed to introduce
the exercise to his group,
to encourage discussion
for 4-5 minutes, and
shortly after announce
that he will not tolerate
any further discussion
and fill in his own
answers at random.  He
should then announce
that the exercise is
finished, leave the group
and hand in his completed
form to the trainer

(b) - the Democratic leader is
instructed to introduce
the exercise to his
group, encourage
discussion, and provide
firm but reasonable
guidance in making
decisions. He should
aim at achieving
approximately 50%
completion of the
answers within the
10-minute period

| Step | Visuals | Comments |
|------|---------|----------|

(c) - the 'Consensus' leader is instructed to introduce the exercise to his group and allow totally free discussion. He will NOT enter any decision until there is TOTAL agreement within his group
   - the exercise should be terminated promptly after 10 minutes and the results from each group compared on the blackboard/flipchart in plenary

Group leaders are asked to call out their group decisions which the trainer enters on blackboard/flipchart. Whenever a group has failed to reach a decision, a nil result is recorded. The results usually illustrate the following:
(i) The Autocratic manager who makes the decision and announces it, achieves a high volume of work but serious dissatisfaction within the group,
(ii) The Democratic manager who provides decisions for the group discussion, achieves a satisfactory volume of work and satisfaction with participants,
(iii) The Consensus manager achieves a small volume of work and frustration amongst the group participants

(b) Trainer and participants discuss merits of the different management styles — Table 4, p. 63 — trainer to be aware of similar visual presentation (p. 282)

| Step | Visuals | Comments |
| --- | --- | --- |
| 13. Trainer and participants summarize session | | |

Module 7: Problem-preventing/Solving at Your Station (pp. 73-74)

## General

This is by far the longest session - 300 to 360 minutes. Participants, organisers and trainer/co-trainers will agree on the problems the health management teams will tackle during the forthcoming months. The participants have also an opportunity to practise the problem-preventing/solving technique as discussed in Module 4: Problem-preventing/Solving.

Timing: 300-360 minutes

## Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. (a) Trainer introduces Exercise 1 (a), (b), (c) (pp. 73-74) | | - trainer to inform participants to use their own method including criteria to select problems<br>- alternatively, trainer may advise participants to use method as described in Appendix D |
| (b) Participants split into groups and do Exercise 1 | | |
| (c) Groups report back in plenary on Exercise 1 | | |
| 3. Trainer summarizes again problem-preventing/solving method | problem-preventing/ solving steps (figure 1., p. 32) | |
| 4. (a) Trainer introduces Exercise 2 (p. 74) | | it is important that trainer/co-trainers provide guidance if necessary |
| (b) Participants split into groups and do Exercise 2. | | |
| (c) Groups report back in plenary on Exercise 2 | | |

|                                                 | Visuals | Comments |
| Step                                            |         |          |
| 5. Organizers/trainers and participants agree on the kind of guidance to be provided by, e.g. Provincial Health Management Team, trainers | | |

28

# Module 8: Principles of Management (pp. 87-106)

## General

This module is a kind of stimulator and as such aims at introducing some basic principles of management. The module can be easily used whenever you as a trainer or speaker are invited to give a talk on management.

**Timing:** some 150 -180 minutes

## Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. (a) Trainer introduces one of the exercises, e.g. Exercise 3. A Questionnaire (pp. 101,102) | | trainer may start with any other step, e.g. step 4 |
| (b) Each participant does the exercise | | |
| (c) Trainer and participants draw conclusions | directives 1. and 21. (pp. 101,102) | - see particularly directives 1. and 21.<br>- exercise illustrates communication, e.g. inadequate reading leads to poor task accomplishment |
| 3. (a) Trainer introduces another exercise, e.g. Exercise 4. 'The Story' (pp. 103,104) | | |
| (b) Each participant does the exercise | | |
| (c) Trainer finds out frequency of 'true', 'false' and ? ('doubtful') for each statement | table with the 4 columns: statement, T, F, ? | the discussion is likely to be very lively |

29

| Step | Visuals | Comments |
| --- | --- | --- |

(d) Trainer and participants agree whether each single statement is 'true', 'false' or 'doubtful'

answers to the statements

1. = doubtful (owner and business-man can be two different persons)
2. = doubtful (a man who demands money need not be a robber)
3. = false
4. = doubtful (owner could be a woman)
5. = doubtful (a draught of wind could scoop up the contents)
6. = true
7. = doubtful (see also 5.)
8. = doubtful (contents of cash register may not include money)
9. = doubtful (see also 2.)
10. = false (member of police force)
11. = true

4. Trainer and participants define management and identify management functions

—'management is getting things done through other people'
—figure 1., p. 90

other possible definitions

5. Trainer introduces 'planning' (pp. 90,91)

figure 2., p.91

6. Trainer introduces 'implementation' (pp. 92-94)

sub-functions of implementation (p. 92)

| Step | Visuals | Comments |
|------|---------|----------|
| 7. (a) Trainer invites partici-<br>pants to write down on a<br>sheet of paper 3 important<br>motivating factors which<br>affect their job performance | | |
| (b) Each participant reads out<br>his/her 3 motivating factors | | trainer to encourage<br>participants to read |
| (c) Trainer writes motivating<br>factors and frequency on<br>blackboard/flipchart | blackboard/<br>flipchart | their motivating factors<br>from sheet of paper and<br>not to refer to those<br>already listed on the<br>blackboard/flipchart |
| (d) Trainer and participants<br>draw conclusions | | |
| 8. Trainer introduces 'motivation'<br>(pp. 92,93) | figure 3., p.93 | |
| 9. Trainer introduces 'delegation'<br>(pp. 93,94) | guides for<br>delegation,<br>p.94 | |
| 10. Trainer introduces<br>'evaluation'<br>(p. 95) | main steps of<br>evaluation,<br>p.95 | |
| 11. Trainer introduces<br>'communication'<br>(pp. 95,96) | figure 4.,<br>p. 95 | trainer to refer to<br>Exercise 3. A<br>Questionnaire |
| 12. (a) Trainer introduces<br>Exercise 6. (p.88)<br>(b) He invites participants<br>to list on a sheet of<br>paper 3 explanations<br>(reasons) why the<br>decision went 'right'<br>(c) Each participant reads out<br>his/her 3 reasons | | |
| (d) Trainer writes reasons and<br>frequency on blackboard/<br>flipchart<br>(e) Trainer and participants<br>draw conclusions | blackboard/<br>flipchart | |
| 13. Trainer introduces 'decision-<br>making' (pp. 96,97) | decision-making<br>using:<br>- central authority<br>- democratic method<br>- consensus method | |

| Step | Visual | Comment |
|------|--------|---------|
| 14. (a) Trainer introduces Exercise 1 (p 87) | | text of this exercise is incomplete; should read as follows: "In a hospital OPD, there are 3 clinical officers (COs) on duty. Together the COs see 90 patients per hour. They prescribe an injection for 40% of those patients. There is one nurse working in the injection room (IR). She can give 18 injections per hour. Questions: (i) What happens at the IR? (ii) What would you do? |
| (b) Each participant does the exercise | | Time available: 5 minutes |
| (c) Trainer and participants answer the two questions | blackboard/ flipchart | -it is important to structure the information which is available -generate many remedial actions -consider feasibility after having identified possible remedial actions |
| 15. Trainer introduces the 'systems approach' (pp. 97,98) | | trainer and participants to provide illustrations |
| 16. (a) Trainer introduces Exercise 2 (p. 88) | | |
| (b) He invites participants to write on a piece of paper 3 relevant factors for managerial effectiveness | | |
| (c) Each participant reads out his/her 3 factors | | |

| Step | Visuals | Comments |
|------|---------|----------|

    (d) Trainer writes factors and frequency on blackboard/flipchart

blackboard/flipchart

    (e) Trainer and participants draw conclusions

trainer to emphasize the relevance of these factors for all of us as managers

17. Trainer introduces 'skills of an effective manager' (pp. 98,99)

3 main skills, pp.98,99

18. (a) Trainer introduces Exercise 7 (p. 105)

optional

    (b) Each participant does exercise

time available: 5 minutes

    (c) Trainer and participants develop solutions

blackboard/flipchart

possible solution:

19. (a) Trainer introduces Exercise 8 (p. 106)

    (b) Each participant does the exercise

&ndash; time available: 3 minutes

    (c) Trainer and participants discuss solutions

&ndash; one possible solution &ndash; dwarf who cannot reach the 15th button

20. Trainer introduces 'Vertical Lateral Thinking' (p. 100)

summary of Table 1, p. 100

21. Trainer summarizes session
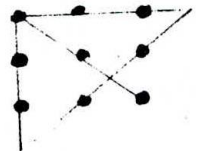
Module 9: Health as Part of Socio-economic Development (pp. 107-116)

## General

During this session participants have an opportunity to practise their conceptual skills. Participants will spend a considerable amount of time in doing the exercises in their groups.

Timing: some 120 minutes

## Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. As part of their homework participants study the paper 'Health and the Development Process' (pp. 109-116) | | |
| 2. Trainer introduces session objectives | | |
| 3. (a) Trainer introduces the paper 'Health and the Development Process' | | |
| (b) Participants raise questions related to the paper | | |
| 4. (a) Trainer introduces Exercises 1 to 5 (pp. 107,108) | | |
| (b) Participants split into groups and do all exercises | | |
| (c) Groups report on their findings | | |
| 5. Trainer and participants summarize session | | |
| 6. Group rapporteurs prepare 'consolidated' solutions/ answers to exercises | | not necessary if participants wish 'individual' group reports |

Module 10: Group Working (pp. 117-146)

General

Much of the work during this session will be done in groups. Participants should recognize the importance of group working and develop their strength in group working.

The module is one of the more difficult ones. There is a risk that the session may turn out to be too academic and boring. The trainer should avoid extensive lecturing on group definition, group roles and responsibilities, group dynamics, etc. In doing the exercises in groups the participants will have to refer to the reading materials and find out for themselves some basic principles and requirements of effective group working.

Timing: 150-180 minutes

Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. (a) Trainer identifies one 'Observer' for each group and briefs them on 'Process Observation' and the 'Observer Worksheet' (pp.130-134) and provides them with the sheets | | this step has to take place prior to one of the sessions preceding this session on Group Working |
| (b) Each observer observes his/ her group and writes comments on Observer Worksheet | | group work to be observed should last at least 30 minutes. |
| (c) Trainer discusses completed Observer Worksheets with observers prior to the session on Group Working. Observers may rephrase some of their comments to avoid offensive statements | | |
| 2. As part of their homework participants study the reading materials 1 to 6 (pp. 119-134) | | |
| 3. Trainer introduces session objectives | | |

| Step | Visuals | Comments |
|---|---|---|

4. (a) Trainer introduces Exercise 1 and distributes handouts for Progress Check (pp. 135,136)

   (b) Each participant completes his/her Progress Check sheet

   (c) Participants keep their sheets

   (d) Participants complete similar sheets 2 days later and on the last day and compare them with the previous sheets

5. Observers report their observations; groups comment on observations

             *see step 1.c. (avoid mentioning names where negative statements are made)*

6. (a) Trainer introduces the topic referring to reading materials

                 -definitions of a group (p. 119)     some 20 minutes
-roles (p. 121)
-group performance and development - 5 stages (pp.123,124)
-commitment grid (figure 1., p.129)

   (b) Participants raise questions concerning reading materials

7. (a) Trainer introduces Exercises 2 (p. 118), 3 (p. 118) and 4 (pp. 137-140)

                                                      for Excercise 4 participants should not refer to suggested answers (pp. 141-146

   (b) Participants split into groups and do all three exercises

                                                      allocation of time to the exercises is important

   (c) Groups report on their findings in plenary

| Step | Visuals | Comments |
|------|---------|----------|
| 8. Trainer and participants summarize session | some of the visuals of step 6. | |
| 9. Group rapporteurs prepare 'Consolidated' solutions/ answers to exercises | | not necessary if participants wish 'individual' group reports |

## Module 11: Organization and Co-ordination (pp. 147-160)

### General

The session is designed to illustrate and discuss with participants the importance of: (i) good organization; (ii) the need for management to set objectives and to recognize the importance of key result areas; (iii) to appreciate management's responsibility for co-ordinating work between all departments.

**Timing:** 135-150 minutes.

### Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. As part of their homework participants study the paper Organization and Co-ordination (pp. 149-159) in preparation for this session | | |
| 2. Trainer introduces session objectives | | |
| 3. Trainer leads discussion on natural groupings and the importance of good good organization (pp. 149,150) | | |
| 4. Trainer leads discussion on Organization Structure (pp. 150-152) | examples<br>- figure 1 and 2 (pp. 150,151)<br>- other illustrations | |
| 5. Trainer invites participants to sketch an organization chart of their own work station | | |
| 6. Trainer leads discussion on the different types of informal relationships commonly found in organizations (p.153) | illustrations | - trainer to ask participants to identify any informal relationships at their own work stations<br>- trainer to inform participants of possible negative informal relation- |

| Step | Visuals | Comments |
|---|---|---|
| 7. Trainer leads discussion on the importance of communicating the organization's objectives to all staff and also of identifying both organization and personal key result areas (pp.154,155) | | - the examples of key result areas listed on p.155 should be referred to<br>- thereafter the participants are asked to identify two or three personal key result areas |
| 8. Trainer briefly refers to: | | |
| (a) Relationship between authority and responsibility (p. 156) | | |
| (b) The effect of a manager's span of control (p. 156) | figure 4., p. 156 | |
| (c) The number of levels of authority within the organization (p. 157) | figure 5., p. 157 | |
| 9. Trainer leads discussion on the importance of vertical and lateral co-ordination (pp. 157-159) | figures 6. and 7., p. 158 | |
| 10 (a) Trainer introduces Exercise 1 to 5 (p. 148) | | |
| (b) Participants split into their teams and do all the exercises | | trainer to ensure that participants split into their health management teams |
| (c) Groups report on their findings | | |
| 11. Trainer and participants summarize session | | trainer to refer to existing 'standard' organization chart |
| 12. Group rapporteurs prepare summary in addition to group reports | | |

Module 12: Communication (pp. 161-185)

## General

This session is to ensure that participants recognize the vital importance of good communication. The exercises are designed to develop and improve the communication skills of participants.

Timing: some 120 minutes

## Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. Trainer introduces session objectives | | |
| 2. Trainer leads discussion on definition, objectives and general principles of good communication (p. 162) | use blackboard/ flipchart | |
| 3. (a) Trainer introduces Exercise 1 (p. 179) | | |
| (b) Exercise is done | | it is most important to ensure that:<br>- each person repeats the message only once<br>- the receiver of the message is not allowed to seek clarification or question transmitter<br>- the observers will note that as the exercise progresses, the message gets both shorter and distorted, thus illustrating the importance of feedback |
| (c) Trainer and participants draw conclusions | | |
| (d) Trainer contrasts advantages and disadvantages arising from good and poor communication (p. 163) | | |
| (e) Trainer emphasizes the importance of feedback | figure 1., p. 165 | |

| Step | Visuals | Comments |
|---|---|---|
| 4. Trainer leads discussion on methods of commumnication (pp. 166-168) | figure .2., p. 166 | |
| 5. Trainer leads discussion on the 5 'C's of communication (pp. 168-170) | each of the 5 'C's | exercise 2 (p. 181) is part of step 5. This exercise illustrates that the receiver often interprets a different message from the communication that is sent by the transmitter. Allow participants 2-3 minutes for this exercise. Upon completion trainer will find out the number of 'F's seen in the message by participants. Correct answer is 6. Most participants will score between 2 and 4. They will overlook the 3 'F's of the words 'OF' |
| 6. Trainer leads discussion on the 6 skills of communication (pp. 171-174) | | Exercise 3 and 4 are part of step. 6<br>- Exercise 3 (p.182)<br>This exercise illustrates that communication often breaks down because the receiver assumes that he has understood. Allow participants 2-3 minutes to complete the exercise. Many will omit the duplication of the word 'THE' in the fist 2 triangles and the word 'A' in the third triangle<br>- Exercise 4 (p. 183) - optional<br>This exercise illustrates that simple short messages are usually more easily understood. The possible answers include: 1. It depends upon.... 2. Use if system fails. 3. This is unacceptable. 4. The delivery of spares resulted in.... 5. The report refers to defective material. 6. Find .... 7. We did not proceed because.... 8. We cannot give any opinion because the proposal is not clear. 9. Economic aspects are also important. 10. We have.... |

# Module 13: Motivation: (pp. 187-207)

## General

This session is to discuss the meaning and importance of motivation and how it is possible to apply the theories of motivation in practical work situations.

## Timing: 135-150 minutes

## Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. As part of their homework participants study the paper 'Motivating employees' (pp. 188-200) in preparation for this session | | trainer to stress that participants read only paper and <u>not</u> to do any of the exercises |
| 2. Trainer introduces session objectives | | |
| 3. Trainer leads discussion on leadership and management styles and the progress from the Disciplinary Stage to the Motivation Stage (p. 188,189) | - definition of leadership<br>- list of qualities that make a good leader | trainer to invite participants to contribute their definition of leadership and compile a list of the qualities that make a good leader on blackboard/flipchart |
| 4. Trainer leads discussion on the relationship between Authority and Responsibility (pp. 189-193) and the qualities a manager requires to fulfil hiw work satisfactorily (pp. 189-193) | - authority/responsibility diagram | trainer to build up step by step a visual display of the Authority/Responsibility diagram (pp. 190, 191) |
| 5. Trainer introduces and discusses:<br>- Theory X and Theory Y (p. 193)<br>- People's needs (pp. 194-197)) | figure 1., p. 194 | |
| 6. (a) Trainer introduces Exercise 1 (pp. 201,202)<br><br>(b) Participants do exercise individually in plenary | | trainer not to disclose scoring (see step 6. c.)<br><br>10-15 minutes |

43

| Step | Visuals | Comments |
|---|---|---|

(c) Participants assess their own scores

- for scoring: Always = 3; Nearly always = 2; Sometimes = 1; Never = 0
- average score: 20-26 out of 36 possible

(d) Trainer and participant interpret scores

participants with low scores have problems with motivating their staff

(e) Trainer leads discussion on each of the questions contained in the exercise. Each of the questions highlights an important aspect of motivation

7. (a) Trainer hands out to participants Exercise 3 (p. 204) and invites each participant to tick his choice of answers under the headings 'Agree' - 'Disagree'

it is advisable to read the quotations out laying emphasis on originator of the quotation. After 10 minutes, compile on blackboard/flipchart the number who agree/disagree with each quotation. In a typical response the majority will agree with 2,3,6 and disagree with 1,4 and 5. Upon completion of results, disclose to participants that the quotations are entirely fictitious and that the exercise illustrates that we are all conditioned by our own inherited experiences and prejudices

(b) Trainer emphasizes the importance of judging individuals on their own merits

8. Trainer summarizes the benefits of a well motivated staff and develops a discussion on the 'Attitudes' and 'Actions' that can enable management to motivate their own staff (pp. 198-200)

illustrations

44

|       |                                   | Visuals | Comments |
|-------|-----------------------------------|---------|----------|

Step

9. (a) Trainer introduces Exercise 2 (p. 203)

trainer to explain that the exercise is an actual survey conducted for industry. Participants fill in column 'Personal Rating'. Time: approx. 10 minutes

(b) Participants do exercise

(c) At the completion of the exercise, trainer discloses to participants the actual results of the survey. Trainer leads participants in a discussion on reasons why the supervisors' ratings are so often different from those of their employees, i.e. lack of knowledge of individuals' wants, assumptions, poor communication

The actual results of the survey are best illustrated on a prepared flipchart and are as follows:

| Factors | Supervisor | Employee |
|---------|------------|----------|
| High wages | 1 | 5 |
| Job security | 4 | 2 |
| Promotion in the company | 3 | 7 |
| Good working conditions | 2 | 9 |
| Interesting work | 5 | 6 |
| Personal loyalty of supervisor | 6 | 8 |
| Tactful discipline | 7 | 10 |
| Full appreciation of work done | 8 | 1 |
| Help with personal problems | 9 | 3 |
| Feeling of being involved in things | 10 | 4 |

10. (a) Trainer summarizes the main points of the module and emphasizes the point that motivation is most effective if you work at it over a period (p. 200)

(b) Trainer draws participants' attention to the points raised in 'Guide on human relations' (p. 205)

guide on human relations

(c) Trainer draws participants' attention to 'A guide to fulfilling the needs of employees' (pp. 206,207) and develops a discussion on the various points that are included

## Module 14: Perception and Self-development (pp. 209-244)

### General

This is another module which requires solid preparation and alertness by the trainer. Preferably, the trainer will use the exercises as a main tool for achieving the session objectives. The trainer should be well prepared for and rely mainly on the exercises.

**Timing:** 150-180) minutes

### Process

| Step | Visuals | Comments |
|---|---|---|
| 1. As part of their homework participants study the reading materials 1 to 5 (pp. 211-224) | | |
| 2. Trainer introduces session objectives | | |
| 3. (a) Trainer and participants do Exercise 1 (p. 225) | | - trainer to use enlarged picture<br>- trainer to use an alternative picture (e.g. wine glass) |
| (b) Trainer and participants comment on the nature of perception | | |
| 4. (a) Trainer introduces Exercise 2 (pp. 226,227) | | preferably, trainer to distribute handouts of pp. 228 and 229 |
| (b) Participants do exercise individually or in groups | | preferably, participants do the exercise individually in plenary to save time |
| (c) Participants read what they have written | | |
| (d) Trainer and participants draw conclusions | | - handout A - rather negative description<br>- handout B - rather positive description |

| Step | Visuals | Comments |
|------|---------|----------|
| 5. (a) Trainer introduces Exercises 3 (pp. 230-234) and Exercise 4 (pp. 235-237) | | - Exercise 4 optional<br>- trainer to distribute handouts of Personal and Circulation Worksheets (pp. 233,234) |
| (b) Participants split into groups and do the two exercises | | |
| (c) Groups report on their experience in doing the exercises back in plenary | | |
| (d) Trainer summarizes the OK/Not OK Live Position | figure 5., p. 235 | |
| 6. Trainer introduces the Johari Window (pp. 214-127) | figure 1., p. 214 | |
| 7. (a) Trainer introduces Exercise 6 (pp. 239-243) | | optional |
| (b) Participants do exercise individually in plenary | | |
| (c) Trainer introduces reading material 4 ( pp. 219-222) | the four orientations (pp. 219,220) | |
| (d) Trainer and participants calculate the arithmetic mean for each of the orientations | blackboard/ flipchart | arithmetic mean = scores of all participants for each orientation divided by number of participants |
| (e) Trainer and participants interpret these results | | |
| (f) Trainer and participants draw conclusions | | |
| 8. (a) Trainer introduces Exercise 5 (p. 238) | | Printing error, p.238 `equal or subordinate position' should read `equal or superior position' |

| Step | Visuals | Comments |
| --- | --- | --- |
| (b) Participants do the exercise individually in plenary | | |
| (c) Trainer asks for feedback from participants (e.g. target position as compared with actual position) | | |
| 9. Trainer introduces Exercise 7 (p. 244) | | exercise to be done by individuals back at home |
| 10. Trainer and participants summarize session | | |

## Module 15: Delegation (pp. 245-258)

### General

During this session participants have an opportunity to further develop their delegation skills.

**Timing:** 120 minutes

### Process

| Step | Visuals | Comments |
|---|---|---|
| | | trainer to stress that participants should read only paper and **not** to do any of the exercises |
| 1. As part of their homework participants study the paper 'Effective delegation' (pp. 247-250) in preparation for this session | | |
| 2. Trainer introduces session objectives | | |
| 3. Trainer leads discussion on:<br>- definition and components of delegation (pp. 247,248<br>- steps in the delegation process | main steps (p. 248) | |
| 4. (a) Trainer introduces Exercises 3 and 4 (p. 245)<br>(b) Participants split into groups and do the two exercises<br>(c) Groups report their findings in plenary | | |
| 5. (a) Trainer introduces Exercise 5 (pp. 251-256)<br>(b) Participants do exercise individually in plenary<br>(c) Participants share their answers with their colleagues<br>(d) Trainer and participants draw conclusions | | |

| Step | Visuals | Comments |
| --- | --- | --- |
| 6. (a) Trainer introduces Exercise 6 (pp. 257,258) | | trainer to invite participants to use form back at their stations |
| (b) Participants practise use of the form by doing one or two tasks and share their experiences | | |
| 7. Trainer and participants summarize session | summary (p. 250) | |

Module 16: Guidance and Supervision (pp. 259-269)

General

This session is to discuss with participants the importance of a positive style of supervision and to recognize the benefits which could arise from such a style. Also included are management's responsibilities for setting and maintaining the standards of work and conduct expected from subordinate staff.

Timing: some 135 minutes

Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. As part of their homework participants study the paper `Guidance and Supervision' (pp. 261-269) in preparation for this session | | |
| 2. Trainer introduces session objectives | | |
| 3. Trainer leads discussion on Negative and Positive styles of supervision (pp. 261,262) and emphasizes the benefits of a positive style of supervision | requirements of positive supervision suggested by participants | trainer to invite participants to compose their own list of the requirements for positive supervision. To request suggestions from participants and compile on blackboard/flipchart. To compare the list with the requirements listed in the manual (pp. 262,263) |
| 4. Trainer leads discussion on 'Setting Standards of Work' and emphasizes the 4 guidelines as described in the manual (pp. 265-268) | figure 1., p. 267 | trainer to illustrate the `Measurement of performance' shown in figure 1., p. 267. Participants to suggest practical examples from their own work situation |
| 5. Trainer leads discussion on the necessity for setting and maintaining rules for conduct | rules for rules (p. 268) | trainer to emphasize the positive benefits of involving staff in agreeing on rules for conduct. Trainer to emphasize the 'Rules for rules' (p. 268) |
| 6. Trainer leads discussion on guidelines for conducting disciplinary interviews (pp. 268,269) | | |

51

TM-110
N85
09241
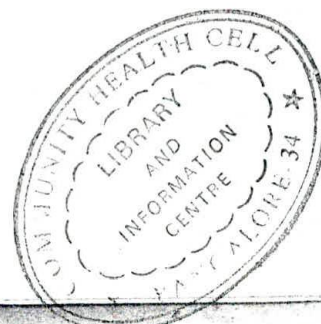
| Step | Visuals | Comments |
| --- | --- | --- |

7. (a) Trainer introduces
       Exercise 1.(a), 1.(b) and
       1 (c) (pp. 259,260)
   (b) Participants split into
       groups and do exercise
   (c) Groups report their
       findings in plenary

8. Trainer and participants
   summarize the reports

Module 17: Leadership Behaviour (pp. 271-297)

General

The nature of this module is similar to that in Module 10 (Group Working) and Module 14 (Perception and Self-development). Once again, the trainer should rely very much on the exercises to achieve the session objectives.

Timing: 150-180 minutes

Process

| Step | Visuals | Comments |
|------|---------|----------|
| 1. As part of their homework participants study reading materials 1 to 5 (pp. 273-286) | | |
| 2. Trainer introduces session objectives | | |
| 3. (a) Trainer introduces topic | figure 1., p.275 | trainer refers also to cover of manual |
| (b) Participants raise questions concerning reading materials | | |
| (c) Trainer and participants answer questions | | |
| 4. (a) Trainer introduces Exercise 1 (p. 272) and 4 (pp. 287,288) | | for Exercise 4, additional step 3: Relate individual answers and group viewpoint to 'Continuum of Leadership Behaviour', p. 282 printing error, p.282: delete 'Figure 2. Check-list of Socio-economic Conditions' and substitute with 'Continuum of Leadership Behaviour' |
| (b) Participants split into groups and do exercises | | |
| (c) Participants meet again in plenary | | |
| (d) Groups report on their findings in plenary | continuum of leadership behaviour, (p. 282) | this step replaces Exercise 2 |
| (e) Trainer and participants draw conclusions | | |

| Step | Visuals | Comments |
| --- | --- | --- |
| | | optional |
| 5. (a) Trainer introduces Exercise 5 (pp. 289-292) | | |
| (b) Participants do the exercise individually in plenary | | |
| (c) Trainer and participants interpret results | -blackboard/ flipchart<br><br>-continuum of leadership behaviour, (p. 292) | figures can be related to continuum of leadership behaviour, p. 292 |
| 6. (a) Trainer introduces Exercise 6 (pp. 293-297) | | |
| (b) Participants do steps 1 and 2 of exercise individually in plenary | | at this stage not step 3 |
| (c) Trainer introduces reading material 5 (pp. 285,286) | managerial grid, (p. 286) | |
| (d) Participants do step 3 of Exercise 6 | | |
| (e) Trainer and participants interpret outcome of exercise | | |
| 7. Trainer and participants summarize session | -figure 1., p. 275<br>-continuum of leadership behaviour (p. 282)<br>-managerial<br>-managerial grid (p. 286) | |

## Module 18: Management of Hospital Outpatient Services (OPS) (pp. 299-303)

### General

During this session participants have an opportunity to apply some principles of management in the context of hospital outpatient services.

Timing: some 120 minutes (much more time could be allocated to this session if the publication Guidelines for the Management of Hospital Outpatient Services by the Government of Kenya, Ministry of Health, Administrative Support Unit, 1982 is introduced).

### Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. (a) Trainer introduces Exercise 1 (p. 249). Trainer invites participants to write down on a sheet of paper 3 important problems in the management of hospital OPS | | |
| (b) Each participant reads out his/her problems | see note on layout of Module 3 | trainer to encourage participants to read their problems from sheet of paper and not to refer to problems already listed on the blackboard/flipchart |
| (c) Trainer writes each problem and frequency on blackboard/ flipchart | | |
| (d) Trainer and participants determine priorities in terms of frequency | see note on layout of Module 3 | |
| (e) Trainer and participants indicate whether each problem is of a resource or non-resource (managerial) nature | see note on layout of Module 3 | |
| (f) Trainer and participants draw conclusions | | |

| Step | Visuals | Comments |
| --- | --- | --- |

3. (a) Trainer introduces
       Exercise 2 (pp. 301-303)

   (b) Trainer and participants
       review and discuss the
       study form (see task 1
       of Exercise 2)

-accumulated figures
 for arrivals and
 patients seen      --
-figure for waiting =
 difference between
 arrivals and patients
 seen
-stations start at
 different times

   (c) Participants split into
       groups and do tasks 2
       and 3 of Exercise 2

   (d) Groups report on their
       findings in plenary

-too many patients
 waiting within the
 OPS system. Waiting in
 the general waiting
 area cannot be
 avoided. However, once
 a patient is being
 seen, he/she should
 move smoothly through
 the different stations
-different start and
 break times
-registration of
 patients should be
 synchronized with
 clinical diagnosis
 output

4. Trainer and participants
   draw conclusions of session

trainer to stress
relationship between
number of patients
and quality of care

## Module 19: Forthcoming Problem-preventing/Solving Activities at Your Station
### (p. 305)

### General

This is a rather short session. During this session the teams decide on the two or three problems they want to tackle during the forthcoming months. At the same time they indicate the dates for completing the implementation plans.


### Timing: some 60 minutes


### Process

| Step | Visuals | Comments |
|---|---|---|
| 1. Trainer introduces session objectives | | |
| 2. (a) Trainer introduces Exercises 1 and 2 (p. 305) | | - trainer to inform participants to use their own method, including criteria, to select problems<br>- alternatively, trainer may advise participants to use method as described in Appendix D<br>- HMTs should also identify technical support required |
| (b) Participants split into their teams and do the two exercises | | |
| (c) Teams report back in plenary on the two exercises | | |
| (d) Reports are typed and distributed | | reports are an agreement between HMTs and organizers |

## Comparison of Main Training Techniques

| Technique | Useful for | Comments |
|---|---|---|
| Lecture/talk | Giving background information<br>Presenting general interest information<br>One of the ways of coping with a very large audience | Limited use for developing understanding or changing attitudes<br>No guarantee of absorption of information; no feedback (unless the speaker employs additional techniques)<br>Use this technique sparingly |
| Group instruction | Presenting factual information and ensuring retention | Not the best method of developing an understanding of principles<br>Not the best method for changing attitudes<br>Not suitable for a group of more than 16 people |
| Discussion leading | Developing understanding<br>Influencing attitudes<br>Giving feedback to the trainer | Not suitable where factual information must be put across and retention assured<br>Not suitable for a group of more than 16 people: 10 is the optimum |
| Case study | Providing discussion and understanding of real issues rather than abstractions<br>Giving trainees the opportunity of listening to the ideas and opinions of their colleagues concerning practical on-the-job problems<br>Developing role-play situations<br>Providing trainees with an opportunity to bring out their own similar problems and look at them objectively | The case should not be too remote from the experience of the trainees<br>Care must be taken to bring out the relevance of the lessons to every trainee in his real-life working situation. As for the case study techniques, not suitable for a group of more than 16 people: 10 is the optimum |

Choosing the Best Venue (Setting Priorities by Means of Selected Criteria

| Venue<br><br>Criterion | Venue A | Venue B | Venue C | Venue D |
|---|---|---|---|---|
| Cost | Second | First | Third | Fourth |
| Training facilities | Third | First | Second | Fourth |
| Accommodation/board | Fourth | Second | First | Third |
| Hotel management | First | Second | Fourth | Third |
| Overall priority | Second | First | Third | Fourth |

KEY

First   -  best satisfies a given criterion
Second  -  second best; etc.

| Technique | Useful for | Comments |
| --- | --- | --- |
| Role playing | Developing communication and interactive skills<br>Feedback helps the trainee to see himself as others see him (partially at least)<br>Enabling the trainer to give advice and criticism based on behaviour in a simulated situation<br>Building trainee confidence in dealing with similar real-life situations | If trainees are paired off and each pair has an observer who will afterwards give constructive criticism, care must be taken in the selection and briefing of the observer<br>One trainer cannot handle more than 12 trainees using this technique |
| In-basket | Putting trainees under pressure in simulated situations and giving them practice in coping<br>Helping trainees to sort out their priorities<br>Developing an understanding of the different kinds of action we can take (adaptive, corrective, interim, preventative, contingency) | Be sure that the exercise and context are relevant to the kinds of priorities and pressures to which they are subject<br>Optimum number: 10 |
| Programmed learning | Learning factual information<br>When trainees have to work at their own pace, usually alone, and probably at odd times<br>When trainees find reading too passive, or when their attention might wander | Not suitable when group work is needed<br>But programmed instruction can provide a useful prelude to group work |
| Individual study | Learning factual information<br>When trainees have to work at their own pace, usually alone, and probably at odd times<br>When trainees find reading too passive, or when their attention might wander | Not suitable when group work is needed<br>But can provide a useful prelude to group work |
| Management games | Giving supervisors practice in dealing with supervisory problems in practical ways | Ensure relevance to trainees' work<br>Relate the game experience to their own jobs<br>(If you cannot do so, do not use the game)<br>Optimum number depends on the game: probably 8-12 |

BRIEFING NOTES

STRENGTHENING THE MANAGERIAL PERFORMANCE

OF HEALTH MANAGEMENT TEAMS

THREE-DAY EVALUATION WORKSHOP 26-28 NOVEMBER, 1984

## TABLE OF CONTENTS

1.      PURPOSE OF THE BRIEFING NOTES

        The purpose of these Briefing Notes is to provide some
        information on the rationale for this forthcoming Evaluation
        Workshop; the objectives of the workshop; **working** approach;
        the agenda; participants; venue and workshop participants.


2.      BACKGROUND

        The Ministry of Health is recently spending much effort on
        implementating the 'Integrated Rural Health and Family Planning'
        (IRH & FP) project.  As you know, one of the Project components
        is 'Strengthening the Managerial Performance of Health Management
        Teams (HMTs).'  A two-pronged approach is being applied which
        consists of: i.  Innovative problem-preventing/solving tasks;
        and ii.  A series of training activities in health management.

        The training which was carried out in 1983 and 1984 included a
        series of three activities for the following HMTs:


        Nyanza Province

        -  Kisii, Kisumu, Nyanza Provincial General Hospital, Municipality
           Kisumu, RHTC Chulaimbo

        _____

             --  Workshop on problem-preventing/solving; planning, Kakamega,
                 4 - 13 May, 1983

             --  Workshop on health management, Kisumu, 8-12 August 1983

             --  Follow-up workshop, Kakamega, 1-3 February 1984

        -  Homa Bay, MTC, Nyamira, Nyanza Provincial General Hospital,
           Municipality Kisumu, Siaya

        _____

             --  Workshop on problem-preventing/solving; planning, Kakamega,
                 8-17 June 1983

             --  Workshop on health management, Kakamega, 5-9 September,
                 1983

           Western Province (Alupe, Bungoma, Busia, Kakamega, MTC, Port
           Victoria, RHTC Mbale)

        _____

             --  Workshop on problem-preventing/solving; planning, Kakamega,
                 18-27 May 1983

             --  Workshop on health management, Kakamega, 22-26 August 1983

             --  Follow-up workshop, Eldoret, 7-9 February 1984

3.   OBJECTIVES OF THE WORKSHOP

   3.1   Evaluation Objectives

         The main objectives of the workshop are:

         a.   To assess the adequacy of the two-pronged approach
              of problem-preventing/solving tasks and a series of
              training activities to strengthen the managerial
              performance of HMTs;

         b.   To assess the adequacy of the learning process and
              the learning materials;

         c.   To list innovative problem-preventing/solving
              activities which have been carried out by the HMTs
              and their members.

         d.   To assess any changes in behaviour of the HMTs and
              their members back on the job;

         e.   To assess any impact - increased efficiency, improved
              staff morale, patients' satisfaction, better health
              services;

         f.   To suggest alternative strategies and actions to
              strengthen the managerial performance of HMTs in
              future.

   3.2   Educational Objectives

         In addition to the evaluation objectives the workshop has
         the following educational objectives:

         a.   At the end of the workshop, participants should:

              i.   Have strengthened their knowledge of and skills
                   in problem-solving;

              ii.  Be able to manage their time more effectively.

         b.   Upon returning to their working settings, participants
              should:

              i.   Be able to apply the knowledge and skills they
                   have acquired in the workshop;

              ii.  Be motivated to share their knowledge and skills
                   with their colleagues and staff.

4.   WORKING APPROACH

During the forthcoming workshop the participants will be the
main actors.  They are responsible for achieving the evaluation
objectives by working together both in groups and in plenary.

The organizers of the workshop - the Provincial HMT and AMREF
will act as facilitators and provide guidance if necessary.
The workshop will also provide an opportunity to discuss and
elaborate on creative approaches to problem-solving and
effective time management.

5.     AGENDA

| Date | Time | Session |
|------|------|---------|
| | | |
| Monday 26.11.84 | 8.30 - 9.00 | 1. Opening Session |
| | 9.00 - 10.30 | 2. Adequacy of two-pronged approach of problem-preventing/solving and training activities; and learning process and learning materials |
| | 10.30 - 11.00 | Coffee Break |
| | 11.00 - 13.00 | Continuation of session 2. |
| | 13.00 - 14.15 | Luncheon |
| | 14.15 - 16.30 | 3. Creative approaches to problem-solving |
| | | |
| Tuesday 27.11.84 | 8.15 - 10.30 | 4. Innovative problem - preventing/solving activities; change in behaviour; impact |
| | 10.30 - 11.00 | Coffee Break |
| | 11.30 - 13.00 | Continuation of session 4. |
| | 13.00 - 14.15 | Luncheon |
| | 14.15 - 16.30 | 5. Effective time management |
| | | |
| Wednesday 28.11.84 | 8.15 - 10.30 | 6. Alternative strategies and actions to strengthen the managerial performance of HMTs |
| | 10.30 - 11.30 | Coffee Break |
| | 11.00 - 12.00 | Continuation of session 6. |
| | 12.00 - 13.00 | 7. Closing session |

6.      PARTICIPANTS

The workshop will be attended by some 32 participants from Nyanza and Western Provinces:  two representatives of each HMT.

The selection of the workshop participants is most important. The participants have to satisfy the following requirements:

a.   Participants should have attended at least two of the three workshops on problem-preventing/solving and planning; health management; follow-up workshop;

b.   Participants should be interested in the effort to strengthen the managerial performance of HMTs;

c.   Participants should have participated in some problem-preventing/solving activities in their station;

d.   Participants should be ready to carry out several tasks in preparation for the forthcoming workshop.

7.      VENUE

Venue of the workshop is Golf Hotel, P.O. Box 118, Kakamega, telephone 20460, which will provide the working and training facilities and full board.

8.      DATES

The workshop will start on Monday, 26 November 1984 and end on Wednesday 28th November 1984 after luncheon.

All participants are expected to arrive on Sunday, 25 November 1984 in the late afternoon.

All participants are responsible for their own travel arrangements.  If necessary, travel expenses will be reimbursed during the workshop.

IMPORTANT:

9.      PREPARATORY WORK

In preparation for the workshop the two participants of each HMT will have to carry out together and in consultation with other members of their team the following assignments:

| Nature of assignment | Comments |
|---|---|
| a. An assessment of the adequacy of the two-pronged approach of problem-preventing/solving and training activities to strengthen the managerial performance of HMTs | approx. 0.5-1 page |
| b. Assessment of the learning process as applied during the series of three workshops | approx. 1 page |
| c. Illustrations of problem-preventing/solving tasks which have been carried out | at least 1 illustration, preferably 2 illustrations. For each illustration approx. 1 page. Illustration should be structured as follows:<br><br>1. Problem Statement<br>2. Underlying Cause(s)<br>3. Intervention<br>4. Status of implementing Intervention<br>5. Impact<br>6. Constraints Met |
| d. Assessment of impact, e.g. change in behaviour of HMT, individual members, yourself; staff morale; patients' satisfaction; better health services; others | approx. 1-2 pages |
| c. Alternative stategies to strengthen the managerial performance of HMTs | approx. 1-2 pages |

STEP
NO. 2

RANK PROBLEMS IN ORDER OF PRIORITY
USING CRITERIA

| CRITERIA | EVALUATION |
|---|---|
| 1. Frequency of Occurence <br> (Score high if frequent; low if infrequent) | 1.....2.....3.....4.....5 |
| 2. Severity of the Problem <br> (Direct effect on management of health service. Score high if severe; low if not severe) | 1.....2.....3.....4.....5 |
| 3. Consequences/Implications <br> (If problem is not prevented or solved. Score high if of great conseqence; low if little) | 1.....2.....3.....4.....5 |
| 4. Is Problem Preventable/Solvable? <br> (Its vulnerability or feasibility. Score high if resources below are available or not needed; low if not available) | |
| Internally: | |
| (a). Cost (money) | 1.....2.....3.....4.....5 |
| (b). Technology (skills/knowledge) | 1.....2.....3.....4.....5 |
| (c). Facilities | 1.....2.....3.....4.....5 |
| (d). Supplies | 1.....2.....3.....4.....5 |
| (e). Transport | 1.....2.....3.....4.....5 |
| (f). Authority | 1.....2.....3.....4.....5 |
| (g). Actors (me/we) | 1.....2.....3.....4.....5 |
| Externally: | |
| (a). Cost (money) | 1.....2.....3.....4.....5 |
| (b). Technology (skills/knowledge) | 1.....2.....3.....4. ...5 |
| (c). Facilities | 1.....2.....3.....4.....5 |
| (d). Supplies | 1.....2.....3.....4.....5 |
| (e). Transport | 1.....2.....3.....4.....5 |
| (f). Authority | 1.....2.....3.....4.....5 |
| (g). Actors (they) | 1.....2.....3.....4.....5 |
| 5. Implementation <br> (Ease of implementation. Score high if easy; low if hard) | 1.....2.....3.....4.....5 |

| CRITERIA | EVALUATION |
|---|---|
| 6.  Other: _____ | 1.....2.....3.....4.....5 |
| _____ | 1.....2.....3.....4.....5 |
| _____ | 1.....2.....3.....4.....5 |
| CALCUATE TOTAL SCORE: | |
| | |
| Add: All numbers | _____ |
| Divide: By number of criteria used | _____ |
| Result: Average score for all criteria | |
| | ☐ |

Note re: Scoring Criteria:

This is an unweighted score.  In arriving at a final ranking, the DHMT should consider the impact of certain key criteria such as cost and availability of resources.  For example, no matter how good (high) the score, if the cost is prohibitive, or if there is no practical way to obtain essential personnel, then you will want to give the recommendation a low rank.  It will help you to identify these key criteria by going back over the list and drawing a line under them.

Use this score as a general guide only.  Compare the scores for the different problems and the underlined criteria to help you in arriving at a rational decision.