the continuing education of health workers

Guiding Principles for the development of a System

workshop manual

F. R. Abbatt and A. Mejia

. Continuing education addresses both the needs of the present and the needs of the future.

. Continuing education begins by helping the health worker to adapt to new demands on his knowledge, understanding, skills and attitude, so that he can play an increasingly more effective role in the health care of his fellow countrymen.

. Continuing education ends by helping the health worker to provide a suitable environment, facilities and models for the student of today and for the newly qualified health worker of tomorrow.

PROVISIONAL

ACKNOWLEDGEMENTS

This material has been prepared in the Division of Health Manpower Development of WHO Headquarters. It has been developed from a variety of sources and experience from within and outside the Organization.

Professor Charles E. Engel, Faculty of Medicine, University of New South Wales, Australia and Professor George Miller, Clinton, New York, contributed to the text by reviewing the overall strategy and suggesting improvements. Mrs Leslie Ewart, Technical Officer of WHO, assisted in the library searching, reviewing and editing.

Mrs Barbara Amaru, Mrs Christine Gray and Mrs Anne Gordon completed the onerous task of typing and retyping the various drafts speedily and meticulously.

To all of them and the many others who have made valuable suggestions our sincere thanks.

<div align="right">

Fred Abbatt

Alfonso Mejia

</div>

Fred Abbatt is a Senior Lecturer in the Department of International Community Health at the Liverpool School of Tropical Medicine, Liverpool, United Kingdom.

Alfonso Mejia is Chief Medical Officer, Health Manpower Systems, World Health Organization, Geneva, Switzerland.

Continuing the Education of Health Workers

Contents

PART II (b)
<u>Exercises</u>
(Blue Pages)

Exercise 1 - Is Continuing Education Important?
Exercise 2 - What Continuing Education is Currently Available?
Exercise 3 - Is the current provision of Continuing Education satisfactory?
Exercise 4 - Are there resources for Continuing Education which are underused?
Exercise 5 - What Continuing Education is needed in this area
Exercise 6 - Preparing a National Policy Document for Continuing Education
Exercise 7 - What Management Activities will the System of Continuing Education be involved in?
Exercise 8 - Preparing an Educational Activity
Exercise 9 - Organising the System of Continuing Education
Exercise 10 - What Questions should an Evaluation Answer?
Exercise 11 - What data will be needed in the Evaluation?
Exercise 12 - Preparing a Plan of Action

FOREWORD

CONTINUING THE EDUCATION OF HEALTH WORKERS

The World Health Organization has for many years been concerned
with methods of maintaining and improving the competence and relevant
performance of all categories of health worker. Such concern was
explicitly formalized in a resolution adopted by the Twenty-seventh
World Health Assembly in 1974 that called upon Member States
"to consider as a matter of urgency:
1. The development of national systems of continuing education
   for the health professions, based on national and local health
   needs and demands, integrated with health care and educational
   systems, with full utilization of the resources of universities
   and schools of health personnel;
2. The promotion of the systems approach in educational planning
   for continuing education and the periodic assessment of the
   quality of performance of health personnel in delivering
   preventive and curative health care."

This concern is justified everywhere at all times, but becomes of
paramount importance during periods of accelerated change, such as the
one Member countries are now going through to reorient their health
systems to primary health care as the key means to achieve health
for all, under increasingly difficult socio-economic conditions.

In 1982, WHO proposed guiding principles for developing a system of
continuing education for health personnel. They have been deliberately
kept in provisional form, pending the testing of their relevance to
national needs and resources. The material has now been reviewed and
revised to reflect the lessons learned through its application and use.

A system of continuing education is a network of interrelated elements
which embraces the people, policies, plans, functions, and facilities of
several institutions and programmes that have agreed to work together,
rather than in isolation, in order to provide an opportunity for all
health workers to continue progressive learning throughout their careers.
Such a system should encourage the development of inter-institutional links,

facilitate community participation, and ensure the coordination and deployment of resources from various sectors, entities, and programmes, the ultimate aim being the improved competence of all categories of health worker.

Continuing education should respond primarily to the needs of the health system which, in turn, should respond to the needs of the people. It should also answer the needs of health workers striving to maintain and improve their professional competence.

Effective management of health services implies the continuing education of all categories of health personnel, integrating supervision as an essential educational method. Appropriate continuing education should provide an effective bridge between basic training and practice; when it is integrated with supervision, it contributes to the maintenance of standards of health care and promotes the introduction of relevant changes in work patterns. It also provides the foundation for competency-based education. Important as it is, however, continuing education does not have a life of its own and it is not an end in itself. It is a purposeful effort to improve the relevance of human work to the achievement of health policy and programme goals.

This learning package is based on the guiding principles. It represents a step further in WHO's efforts to cooperate with Member countries in the development of systems that coordinate the development and activities of health services and educational and research institutions, professional associations, and other relevant entities, thereby facilitating inter-agency participation in the establishment of continuing education for all categories of health worker, as part of national strategies for health development.

The package emphasizes the need to develop continuing education as a national system in the conviction that sequential, progressive, and relevant continuing education accessible to all categories of health staff calls for a comprehensive, intersectoral, and multidisciplinary approach.

This package is especially intended for decision-makers at all levels of the health care delivery system who are involved and/or interested in organizing the provision of continuing education for health workers as well as for those who are engaged in basic and post-basic training. It is intended to encourage adaptation to each country's political, socioeconomic, and health situation, and has been purposely designed to allow this necessary flexibility. I sincerely hope that Member States will find it suitable and useful for its intended purpose.

T. Fülöp
Director
Division of Health Manpower Development

INTRODUCTION

1.1 The purpose of this book

The overall purpose of this book is to promote the development of systems of Continuing Education and Part I describes some of the principles involved in establishing such a system. These systems may be implemented on a national basis or they may well be based on a region or area within a country and so have a more local character. In either situation the development of systems of continuing education should not be seen as an end in itself: instead the aim of continuing education should be to improve the quality of health care provided by the whole range of health workers. Thus the development of appropriate systems of continuing education for health workers should be seen as one of the key strategies to be adopted to attain the goal of Health for All by the Year 2000.

Within this very broad context, one approach is to stimulate the establishment of systems of continuing education by conducting a workshop. Such a workshop, attended by policy makers and people with influence in the health care system can be used to increase awareness of the importance of continuing education and to start the process of forming plans for a continuing education system. Part II of the book is intended to support workshops of this type by suggesting a timetable, advising on educational methods to be used in the workshop and providing a series of tested educational exercises.

1.2 Overview of the book

This book consists of an introduction and two major complementary and partially overlapping parts:

Introduction	(white pages) describes the purpose and issues of the book;
Part I	(white pages) includes nine chapters that describe concepts and practice of continuing education and which act as reference material on the essential issues involved.
Part II (a)	(red pages) provides guidance on a timetable and the educational methods which can be used in a workshop on continuing education;
Part II (b)	(blue pages) contains a number of educational exercises to be used during the workshop.

The structure of this material and its intended purpose makes it imperative that some essential principles and issues which are relevant to several sections of the book are repeated in different sections.

This complete package will provide resources to help the participants during the workshop and will enable the workshop team to plan and conduct the 5-day workshop. During these five days the participants will review the present provision of Continuing Education in their country or area, identify ways in which this provision can be improved, prepare policy documents, outline programmes and agree on a specific plan of action which will lead to the development of an improved system of continuing education. Thus the workshop is not just concerned with providing knowledge or skills, but with providing a situation where the participants can reach decisions which are implementable.

This book will have achieved its purpose if it helps to stimulate the relevant decision makers to meet together and to reach an appropriate consensus concerning continuing education, which is in turn put into effect.

1.3 How to use this book

This book is designed for three different groups of people, who will tend to use it in three different ways.

The first group are the workshop team who are organizing a workshop in Continuing Edcuation. For this group, the book provides some guidance on how to run a specific workshop. This will be attended by between 10 and 30 of the people responsible for making decisions about training and manpower development in general and in the health sector in particular. The book provides the workshop team with a feasible timetable together with a detailed commentary/on how to conduct each of the sessions, the key points which need to be achieved and some of the points where difficulties and problems may be anticipated. This general commentary is supported by specific exercises which can be used during the workshop. Whilst the intention is to provide sufficiently detailed guidance to enable the workshop team to run a successful workshop, IT IS NOT the intention of this book to impose a rigid programme or to imply that the suggestions made are the only suitable ways to run such a workshop. It is hoped that the workshop team will adapt the materials available in this book to the needs of the local situation.

It is also recognised that the principal qualities required of a workshop team are the abilities to stimulate learning and group problem solving amongst the participants, rather than a high degree of expertise in the development of systems of continuing education. Therefore the factual basis for the workshop should principally be the nine Chapters of Part I.

The second group of readers are the participants in the workshop. It is anticipated that this manual will be used during the workshop as a guide to the various discussions and activities and as a source of general principles and theories about continuing education of health workers. However, ideally, it will also act as a basis for the participants to record their own ideas, thoughts, conclusions and decisions about how a system of continuing education can be implemented in their own specific situation. In other words the participants can transform the general ideas printed in this book into specific proposals for action.

The third group who might use this book are the individual readers who are interested in promoting continuing education systems. It is suggested that these people first read this Introduction and then work through the workshop timetable and exercises of Part II actually doing each of the exercises and consulting the appropriate chapters in Part I. Used in this way, rather than as a conventional book which is read from cover to cover, the individual reader may find that the book is a stimulus to his or her own thinking and that he or she may develop solutions which are more appropriate to the local situation than can ever be provided in a conventional book.

A final point which applies to all the groups who might use this books is that the reference materials provided in the book have been selected and so do not cover all issues in great depth. Therefore, it is likely that readers will wish to refer to more detailed texts. The educational sciences related to continuing education are not really considered in this book so readers interested in planning the educational activities within a system of continuing education may find relevant information in:

(i)   Hall, T.L. and Mejia, A. Health manpower planning: principles methods, issues. Geneva, World Health Organization, 1978.

(ii) Guilbert, J.J. Educational handbook for health personnel. Geneva, World Health Organization, 1981. (WHO Offset Publication No. 35).

(iii) Hornby, P., Ray, D.K. et al. Guidelines for health manpower planning. Geneva, World Health Organization, 1980.

(iv) Katz, F.M. and Fülöp, T., eds. Personnel for health care: case studies of education programmes. Geneva, World Health Organization, 1978. (Public Health Papers No. 70).

(v) Abbatt, F.R. Teaching for Better Learning - a guide for teachers of primary health care staff. Geneva WHO 1980. (Available from AMREF, Nairobi.9

(vi) Katz, F.M. and Fülöp, T., eds. Personnel for health care: case studies of education programmes. Volume 2. Geneva, World Health Organization, 1980. (Public Health Papers No. 71.)

For those readers more interested in the management of the system and its relationship to health manpower development in general, useful references are:

(i) Global strategy for health for all by the year 2000. Geneva, World Health Organization, 1981. ("Health for All" Series No. 3).

(ii) Development of indicators for monitoring progress towards health for all by the year 2000. Geneva, World Health Organization, 1981. ("Health for All" Series No. 4).

(iii) Managerial process for national health development. Guiding principles for use in support of strategies for health for all by the year 2000. Geneva, World Health Organization, 1981. ("Health for All" Series No. 5).

(iv) Health programme evaluation. Guiding principles for its application in the managerial process for national health development. Geneva, World Health Organization, 1981. ("Health for All" Series No. 6).

1.4 Continuing Education and the Need for a System

There is increasing recognition of the need for health workers to continue their education throughout their career. This need is the result of the desire of health workers to improve their own skills and competence, the introduction of new techniques and equipment, changes in patterns of health needs and changes in the policies for health care. (Here the phrase "health care" is not intended to mean just curative treatment for the sick, but also the whole range of provision for promoting health and preventing disease.)

In virtually every situation some response to this need has been made, so continuing education does take place - even though it may in many instances be ineffective or insufficient. Continuing education may be initiated by the health workers themselves, by supervisors, by the managers of the health system or by other agencies such as professional associations, publishers or drug companies. The form of the continuing education may be written materials (journals, books, advertisements), meetings, courses, supervisory visits or a variety of other methods.

With this diversity of approach and of responsibility it is not surprising that the effectiveness of the continuing education should be very variable. So it is natural that in many countries there is concern that there should be more continuing education and that the continuing education provided should be more effective in helping health workers to provide more appropriate health care.

The approach suggested in this book for achieving this target of greater effectivness is to develop a System of Continuing Education. This phrase needs some explanation as it is capable of being interpreted in many ways. A system is not the same thing as an organisation which administers or manages the provision of continuing education. It is much more than that. It is all of the educational activities, the organisational structure which supports and manages the activities and, crucially, the realtionship between the various educational activities, the management and the external agencies or organisations which are involved in the provision of health care (such as the Ministry of Health), to ensure a nationwide coordinated programme in which technology and resources are optimally used.

It is impossible to describe the form of System which is appropriate for each situation - though it is possible to define some criteria for judging a system. Since there is no ideal model for countries or regions to adopt, each country or region within a country should design its own system by taking into account the way in which health care is organised, the local cultural and economic situation, the demand for continuing education and the constraints and resources available. Therefore Part II of this book is a guide to the organization of a workshop which does NOT tell the participants what kind of system is needed. Rather such workshops are designed to help the participants think through their own needs and opportunities and so develop a system which will be appropriate for them.

These issues are discussed in more detail in Part I (Chapters 1 and 2).

1.5 The Stages in the Development of a System

As mentioned above, in very many situations there is at least some kind of opportunity for health workers to continue their education, yet this provision could not be called a system. This is because the educational provision is fragmented and uncoordinated and so needs to be developed into a more effective system.

Probably the most common first stage in the development of a System of continuing education is the recognition that the existing provision and opportunities for continuing education are inadequate. In other words the identification of a problem (see Chapters 1, 2 and 3 of Part I.)

This problem may be recognised either by the health workers themselves (either individually or through some form of association or union) or by the managers of the health care system. In principle the problem might be recognised by the community whom the health workers serve, though in practice this is unusual.
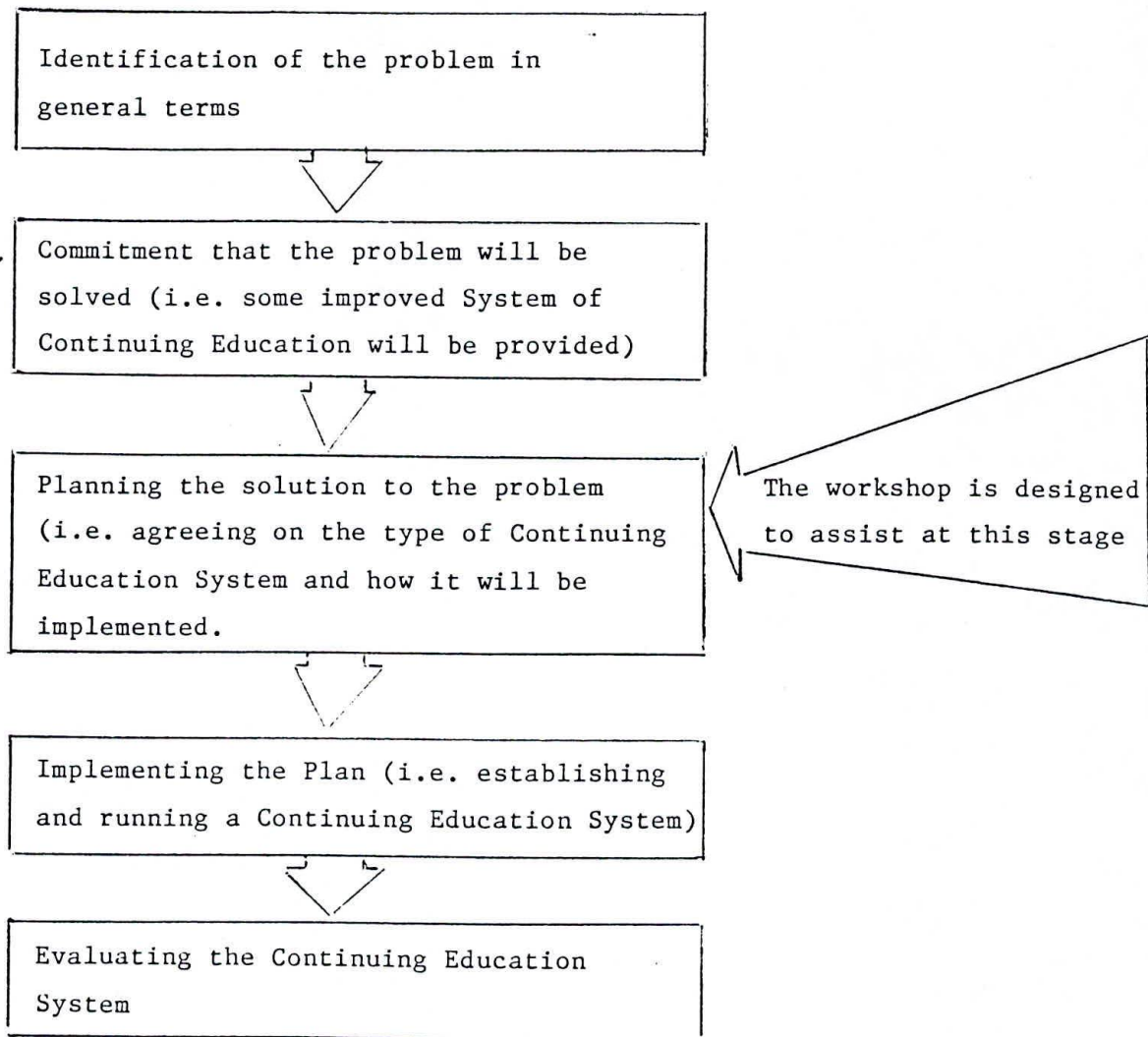
Following this recognition of the problem, the next stage is a commitment or a decision to attempt to solve or reduce the problem. It is at this stage, that the workshop described in this manual becomes useful. Unless there is at least some prior awareness that the current provision of continuing education is unsatisfactory, there is little point in meeting to discuss how that provision could be improved. This does not mean that every participant at the workshop should be aware that this problem exists, but it would be premature to organise such a workshop unless there were at least an influential group who felt that some improvement in continuing education was important.

The workshop can therefore be useful in identifying indivuduals who are already committed in principle to the idea of providing continuing education for health workers. It can also help in persuading other individuals, who are in positions of power or influence, that continuing education is a crucial way of improving the quality and relevance of health care and thus a powerful management tool for the implementation of the strategies to achieve Health For All by the Year 2000.

The next stage is of planning or programming (Chapters 3, 4, 5 and 6 of Part I). The workshop provides a setting where this stage can at least be started. The extent to which planning can be completed will inevitably vary from one workshop to another and depend on the people who attend the workshop. It is hoped, however, that in every workshop some provisional plans are prepared for the next stages of implementing a system of continuing education.

The final stages are to implement the plan and then evaluate the system of continuing education (Chapters 7, 8 and 9 of Part I). These stages can, of course, only occur after the completion of the workshop.

```
┌─────────────────────────────────────────┐
│ Identification of the problem in         │
│ general terms                            │
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│ Commitment that the problem will be      │
│ solved (i.e. some improved System of     │
│ Continuing Education will be provided)    │
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│ Planning the solution to the problem     │         The workshop is designed
│ (i.e. agreeing on the type of Continuing │  ◄───   to assist at this stage
│ Education System and how it will be      │
│ implemented.                             │
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│ Implementing the Plan (i.e. establishing │
│ and running a Continuing Education System)│
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│ Evaluating the Continuing Education      │
│ System                                   │
└─────────────────────────────────────────┘
```

1.6 The Role of a Workshop in Developing a Continuing Education System

The stages in the development of a system outlined in the previous section naturally do not apply in every situation. However, they are sufficiently common to be worth considering. The essential point is that a need must be recognized. However what often happens is that an individual or small group of people recognize this need but do not have sufficient influence or power to bring about the changes and innovations necessary. This is one common situation where a workshop can be of value. If the workshop participants include both a number of people who recognize the need for a continuing education system and a number of the influential decision-makers who do not yet recognize this need, then the workshop can serve to bring about a shared awareness of the nature of the problem.

A workshop can also serve as a forum for identifying specific solutions which would help to solve the identified problems. By bringing together people with different responsibilities and backgrounds, various approaches can be considered in an informal, yet structured, situation. The approaches can be discussed, modified or adapted until some measure of agreement is reached that an approach is feasible and appropriate within the specific situation of the country or area where the workshop is held. Thus the workshop can serve as the starting point for actions and decisions which will lead to the development of the national or area system of continuing education.

Naturally a workshop is unlikely to be the setting for the actual decision making and of course the workshop cannot implement the system. However it can serve as a forum for the sharing of ideas amongst the key decision makers, it can help to bring about a consensus on the need for systems of continuing education and it can promote agreement amongst the participants about the procedures and activities which should follow the workshop in order to implement an effective system. However unless the workshop does lead to specific actions in the development of a system of continuing education, it will have failed.

1.7 The General Nature of a Workshop

The word "workshop" is used very widely to mean an educational event lasting for a period of between half a day to two or three weeks. Usually the word implies a certain style of education which minimizes formal lecturing and presentations of information whilst emphasizing active learning by the participants. These characteristics are also true of the workshop described in this book, but other characteristics are also important.

The most important feature of this workshop is that the aim is NOT for the participants to learn new facts or skills. Nor is it to persuade the participants to accept proposals or solutions presented by the workshop team. Instead, the intention is very firmly to provide a setting where the participants themselves will reach decisions, make plans and initiate change. It is vital that the decisions and plans are those which the participants themselves formulate during the workshop.

Since so much stress is laid on the participants identifying solutions to their own problems, one might argue that there is no need for a workshop and that it would be better to allow the decision-making and problem-solving to take place through the ordinary routine processes. This would be a false argument since the workshop does have clear benefits. These benefits are:

1.   The attention of the whole group of participants is focused on the issue of continuing education for an extended period of time. Thus the experience and expertise of a number of people from differing backgrounds will be available in one place over a period of five days. This is something which would be unlikely to happen under any other circumstances.

2.   The activities of the workshop are structured to guide the problem-solving process. 'This is done by asking particular questions or by setting certain tasks. It is also done by suggesting techniques for problem-solving such as brain-storming and syndicate groups. Whilst these techniques can certainly be valuably used in any problem-solving situation, some of the participants may not be familiar with the techniques and so will benefit from the guidance of the workshop team.

3.   Resource materials in the form of Section 4 of this book will be available for the participants to consult during - and of course after - the workshop.

4.   The workshop is designed to lead to action through the preparation of a "Plan of Action" during the final day and through the type of evaluation which is suggested.

These benefits taken together do not of course guarantee that either appropriate decisions will be made or that any decisions will be implemented. However the design of the workshop is intended to maximize the probability of both of these desirable outcomes.

1.8 The Objectives of a Workshop described in this book

As mentioned at the beginning of this introduction, the overall purpose of the book - and by implication of a workshop - is to support the development and implementation of a national or local system of continuing education. This is done by providing a setting where the participants of the workshop can reach decisions and formulate plans which will be implemented later.

To support this broad purpose, the objectives of the workshop are to enable the participants to:

1.   Describe the existing provision of continuing education (including supervision) in their country or area and make comments concerning its quality in comparison to the criteria outlined in Chapter 2 of Part I.

2. Identify the needs for continuing education in their own country or area in terms of:

    (i)   the people who need continuing education;

    (ii) the skills which these people need to learn.

3. Prepare a document describing the policy for continuing education in their country or area.

4. Prepare a programme for an example of a continuing education project or programme.

5. Prepare a plan for the evaluation of the continuing education system as a whole.

6. Prepare a plan of action for maintaining progress toward the establishment of a system of continuing education.

These objectives are not seen as being a statement of all the possible worthwhile objectives for such a group of participants. Rather they are selected as being the key objectives which will enable the group to initiate work in continuing education.

PART II

Workshop Leaders' Guide

SECTION 1

Introduction

1.1 The purpose of this guide

This guide is designed to help a workshop leader or a workshop team to conduct a workshop on Continuing Education. The aim of this workshop leaders' guide is to guide the workshop team in preparing for and conducting the continuing education workshop.

1.2 The Continuing Education Workshop

The workshop is intended to be a problem-solving occasion during which the participants will review the situation in their own country, identify problems and potential solutions, then prepare plans for how they intend to proceed towards the implementation of a system of continuing education.

Therefore this workshop is not an occasion when the participants learn a new body of information; instead they reach decisions and make plans.

Naturally the decisions and plans will depend on the situation of the country where each workshop takes place. Thus each workshop will be different - and it is important that the workshop team make changes to the timetable and to the exercises so that the workshop is adapted to be of maximum value to the group participating in the workshop.

1.3 The role of the workshop team

It is anticipated that the workshop will be planned and conducted by a team consisting of a leader and two or three other team members.

Because the function of the workshop is for the participants to solve problems, suggest plans and make proposals, it might be thought that the role of the workshop team was not important. This is certainly not true. The success or failure of the workshop will depend heavily on the quality of the preparations made by the team and on the way in which the team helps the participants to complete the activities. However the workshop team will rarely present information and need not be experts in continuing education, since this information is provided in the Technical Papers.

The qualities needed in the members of the workshop team are therefore concerned with:

- expertise in conducting workshops: Amongst the members of the team there must be people with a capacity to lead discussion (without imposing opinions or decisions) and a capacity to administer arrangements efficiently. Experience of conducting other workshops is extremely desirable.
- status and authority: The workshop leader especially should be capable of commanding the respect of the workshop participants.
- time: Members of the workshop team must have sufficient time to prepare thoroughly for the workshop and for all members of the team to be available throughout the workshop.

The work of the workshop team starts well in advance of the workshop itself and continues through the period of the workshop and will then require serious involvement in the evaluation amd follow-up process.

Initially the work may well involve stimulating interest in the idea of a workshop on Continuing Education Systems and in seeking funds and authority to conduct such a workshop (though of course this may have been undertaken by others). Certainly the workshop team should be involved in the planning meeting which should take place about two months before the workshop (see Section 2.1) when the critical decisions about the management of the workshop will be made.

During the workshop, the workshop leader should act as the leading member of the workshop team by conducting meetings of the workshop team at the end of each day and coordinating decisions about changes to the timetable and to the activities planned for each day.

The workshop team (including the leader) will have only a very minor role as providers of information. Their function is to introduce the activities so that all participants understand the point of each exercise and what they are expected to do. They should also <u>manage</u> the activities by:

- ensuring that the activities run more or less according to the agreed schedule
- ensuring that discussions keep to the point and are summarized
- pointing to appropriate sources of information which can help group work.

Another role for the workshop team is to check that all administrative arrangements agreed at the planning meeting are carried out efficiently.

The workshop team should also take responsibility for the timetable and the various activities and exercises during the week of the workshop. The timetable and exercises given in this book have been tried and used in workshops and have been found to be successful. However this does not mean that they will suceeed in every situation or with every workshop team. Therefore it is <u>essential</u> for the workshop team to read the timetable, the commentary and the exercises well in advance. They should then adapt the programme and activities to suit the local situation.

The suggestions here should be seen as a basis which can be developed, not as a final unchangeable package. Needless to say, all changes should be undertaken with care and with regard to the effect of a change in one part of the workshop on all the other parts. Any fundamental change which would make the workshop into a series of lectures or remove the emphasis on the participants solving their own problems would be strongly discouraged.

Finally, the workshop team will be involved in evaluating the workshop. This role is discussed separately in Section 2.5 and Technical Paper 9 elaborates further on this particular issue.

More detailed guidance on specific aspects of the role of the workshop team is provided in the following sections.

SECTION 2

Preparing for the Workshop

Preparing for the workshop will involve making a series of detailed decisions at a planning meeting about how the workshop will be conducted (Section 2.1). It will also involve choosing the participants (2.2) and preparing them for the workshop (2.3). Various resources will need to be arranged and made available for the workshop (2.4) and initial plans made for evaluating the workshop (2.5).

2.1 The Planning Meeting for the Workshop

A planning meeting for the workshop should take place about two months before the date of the workshop.

It should be attended by:

- the workshop leader
- the other members of the workshop team (i.e. the people who will assist the workshop leader in conducting the workshop)
- a representative of the host institution
- a representative of the organization which is funding the workshop
- a representative of the Ministry of Health and/or other organizations which provide health care in the country or region of the country
- possibly a representative or representatives of professional associations.

An individual may fulfil more than one of these roles, so that the number of people involved is kept to a minimum and thereby assist rapid decision-making.

The _purpose_ of the planning meeting is to make all the decisions needed in order for the workshop to take place smoothly. A checklist of the decisions which must be made is supplied below.

Before the planning meeting, all of the people attending the meeting should read Sections 1, 2 and 3 of the Workshop Manual.

The <u>agenda</u> for the meeting should include the following items (though additional items may be necessary depending on local circumstances):

1. Participants in the workshop
2. Location of the workshop
3. Objectives and timetable for the workshop
4. Resources needed for the workshop
5. Administrative arrangements

These agenda items are expanded below in the form of an annotated checklist. However at this stage it may be worth stressing again that the workshop timetable, commentary and exercises provided in the Workshop Manual are a <u>guide</u> and NOT a rigid prescription to be followed precisely. The workshop MUST BE ADAPTED to suit the current state of continuing education, the participants and the general needs, constraints and resources of the country. The planning meeting is required in order to make plans for this adaptation.

<u>Item 1. Participants in the workshop</u>

-   <u>Who will the participants be?</u>

    A list of the proposed participants is needed. Guidance on the selection of participants is given in Section 2.2 of this Leaders' Guide.

-   <u>What contact with the participants will be made before the workshop?</u>

    Specific decisions need to be made about who will contact each of the participants and what form this contact will take. A sensible minimum contact would seem to be a letter of invitation which explains the purpose of the workshop and why that particular participant is invited. This should be accompanied by the participants version of this Workshop Manual. The letter should indicate what parts of the manual should be read before the meeting.
    Suggestions for additional contact are made in Section 2.3 of this Leaders' Guide.

Item 2. Location of the workshop

- **Which insitution will be the host for the workshop?**

    This decision will probably have been made before the planning meeting, so this question is mainly for confirmation.

- **Which rooms will be used during the workshop day?**

    Guidance on the space and facilities required is provided in Section 2.4 of this Leaders' Guide.

- **What provision will be made for meals, etc?**

    Will lunch and coffee be provided? If so, where? Who will be responsible for making the arrangements and for paying?

- **What provision will be made for overnight accommodation?**

    Residential workshops have substantial advantages in that participants are more likely to be able to concentrate on the business of the workshop for the whole day and evening without other commitments. However, they are inevitably more expensive.

Item 3. Objectives and timetable of the workshop

- **What changes should be made to the objectives?**

    The objectives have been written with a typical situation in mind. So they are in general likely to have some relevance for many situations. Yet no situation conforms exactly to the typical situation; always there are detailed differences and sometimes there are substantial differences. Therefore each objective must be scrutinized in turn to decide on its value. (For example, in some situations it may be less valuable for participants to spend time in considering policy documents.)

Another factor is the time available and the speed of working. In the workshop timetable a lot of ground is covered. Inevitably the price for this wide coverage is that issues can only be dealt with fairly superficially. If greater depth is required or if it is felt that the participants might prefer to work more slowly and to spend more time in discussion, then some objectives should be deleted.

- <u>What should the daily schedule be?</u>

This manual suggests a working day from 9 a.m. to 5 p.m. with one hour for lunch. Is this realistic? Can participants really be ready to start at 9 a.m.? Will lunch be completed in only one hour? Would other schedules be more appropriate? Will participants really be willing to spend time working in the evenings?

- <u>Is five days the right length of time?</u>

The suggested timetable is to some extent arbitrary. Local situations may make it possible to extend or, if necessary to contract, the total time. For example, could the workshop start on the evening <u>before</u> Day 1 to complete the registration business and allow participants to get to know one another? This would leave Day 1 for the exercises. On the other hand, will some participants need to travel home on Day 5? So is it reasonable to continue until 5 p.m. on this day?

- <u>Should all the exercises be included?</u>

If the objectives are changed, then some exercises should either be deleted or adapted. Some new exercises may be needed. This meeting is probably not the place to discuss in detail the nature of the changes to exercises or to prepare new ones. However the meeting should decide who will be responsible for making the changes or for preparing new material.

- <u>Who will be responsible for conducting each of the sessions?</u>

It is not appropriate for one person to conduct all of the workshop sessions. It is probably better to think of an overall workshop leader who will usually be responsible for being the chairman of the plenary discussions at the end of exercises.

However, other members of the workshop team should take responsibility for making the detailed preparation of some of the sessions and for presenting them. Group leaders will also be needed for assisting in the small group work and acting as facilitators and resource people. These responsibilities should be identified at this meeting and it should be agreed which people have accepted each responsibility.

Item 4. Resources needed in the workshop

A list of required resources needs to be drawn up, together with a decision on how the resources can be made available and who will be responsible for seeing that this is done. The resources are discussed in Section 2.4. A list of some of the recommended resources is given below.

- Workshop Manuals for every participant.
- Resource books (see Section 1.3 of the Workshop Manual and Section 2.4 of this Leaders' Manual for suggestions).
- National documents describing health policies and plans. (If these are long, then it will be useful for a member of the workshop team to prepare a summary which will be easier to read during the workshop. This will also be valuable in making sure that at least one member of the workshop team has a detailed knowledge of the policies and plans.)
- Curricula of training programmes for all categories of health staff. (Again summaries may be valuable.)
- Demographic, morbidity, mortality and health system utilization data
- Reports of any work studies done in the country or region. (Often no work-studies have been carried out. An alternative is for one or two members of the workshop team to make a point of visiting several health workers from different cadres and briefly interviewing them. The interview should find out what the health workers want to learn about in continuing education and what they see as the weaknesses in the provision of health care.)
- Loose-leaf binders for participants' notes
- Hole puncher
- Large sheets of paper for group reports
- Pens for writing on the large sheets of paper
- Overhead projector and transparencies and pens

- A secretary
- Typewriter and supply of paper and stencils
- Duplicator and/or photocopier
- Table or stand to display resource books and reports.

Item 5. Administrative arrangements

The type of administrative arrangements needed in a particular situation varies very widely from one place to another. So it is not possible to be at all precise about what is necessary. The people attending the planning meeting are in the best position to judge what should be done, so a few of the possible areas are listed below. However, this list should not be relied on as a complete list.

- Authorization for the provision of all resources agreed under Item 4 of the agenda
- Authorization for participants to attend workshop and arrange replacements
- Payment of travelling and/or subsistence allowance
- Publicity for workshop
- Information to appropriate authorities about the workshop
- Preparation and distribution of any report of the workshop, etc.

From the above comments it can be seen that a lot of decisions need to be made at this planning meeting. Therefore it might be useful for the workshop leader or his delegate to prepare detailed suggestions which are circulated in advance to the people attending the meeting. Then the meeting could be mainly devoted to confirming the proposals and to focus on areas of difficulty.

Although a lot of decisions need to be taken, and a lot of effort will be required, the workshop is very unlikely to be successful if this work is not done.

2.2 Selecting the Participants

The selection of participants for the workshop is a matter of the greatest importance, since both the quality of the decisions and plans made during the workshop and the probability of these plans being implemented depends very heavily on who is involved.

The participants should ideally include representatives of all those people who have responsibility for making decisions concerning training of health workers. This means that there should be people from the Ministry of Health who are concerned with allocation of resources, defining job descriptions, setting work norms and supervising health workers. There should also be representatives of the various professional associations and unions which represent all categories of health workers. There should be teachers from medical schools, nursing schools and the colleges and other institutions which provide training for any categories of health workers. Other groups who should be represented include any agencies involved in development or aid who might be interested in supporting activities in continuing education. These agencies will include the various international agencies but might also involve local foundations or companies who have provided support for education or health related activities.

This list of suggestions must be considered in the light of local circumstances to ensure that all influential groups who could either hinder or assist the development of continuing education are involved in the workshop so that they feel at least some commitment to support any proposals put forward by the workshop as a whole.

The above considerations are largely political in nature in so far as they attempt to smooth the path towards implementation of proposals. Another aspect to consider is that those with greatest expertise in continuing education should also take part. Obviously there will be considerable overlap between the groups who have influence and those who have expertise, but it may happen that there are people with particularly valuable experience or ideas who should be invited to participate even though they have little power.

A further consideration is of availability. Participants should not be accepted for this workshop unless they are prepared to devote the whole of the 5-day period to this activity. The design of the workshop depends on full-time participation by all participants so that group processes can develop and a feeling of group identity can be achieved. This is inevitably disrupted if some of the participants are only there for a few of the sessions. Therefore, although it would be very desirable to invite the Minister of Health as a participant, it is unlikely that he or she would be able to devote the total period of the workshop to this single activity.

A way round this problem would be to invite the Minister of Health or very senior members of the Ministry to give the opening address or to attend the closing session so that they could meet the people involved and hear something of the ideas discussed.

Finally the list of all the people whom one would like to become participants must be limited to a maximum of about 30 people. More than 30 people means that discussion sessions are very difficult to handle and inevitably a large number of people in the group get little chance to participate actively.On the other hand, if there are less than about 15 people there may be too few : ٵٸ to provide useful discussion or to represent the many relevant interests involved

Using the general guidelines as a starting point, the local workshop organisers must use their own experience and their knowledge of the personalities involved to select the group of participants who will be most likely to bring about an effective system of continuing education.

Participants should be:
- 15 to 30 in number
- include people with responsibility for health manpower, or responsibility for training
- include representatives of professional associations and aid or development agencies
- include people with expertise in continuing education
- all people should be available for the whole period of the workshop

---

2.3 Preparing the Participants

Once the participants have been selected, the workshop leader or members of the workshop team should attempt to meet each one of the participants in order to prepare him or her for the workshop.

During the meeting the workshop leader should try to find out the participants' existing views on continuing education and the priorities in this field. There should also be an attempt to find out any particular contributions that the participant could make (i.e. particular skills or experience in chairmanship, planning, etc.).

A further purpose is to identify potential problems in advance. Are there for example some people who are easily antagonised by others. Are there people with particularly rigid views? Are there people who have a tendency to dominate discussion too much, or to talk at length on irrelevant issues? The more that the workshop leader knows about the personalities, strengths and weaknesses of the individual participants, the better will be the chance of building on the strength and of avoiding the penalities of the weaknesses.

Finally, the meeting should result in the participant feeling more eager to take part in the workshop and to contribute positively to it. So the meeting must partly be an exercise in "selling" the value of the workshop, whilst also accepting ideas for how the workshop could be made more relevant to each individual participant.

All of the above will only be feasible in a limited number of cases since arranging and attending meetings with each of the participants will be extremely time consuming. Therefore each workshop leader will have to make decisions about how much time can be spent in meetings and how many of the meetings can be replaced by letters or telephone calls. However the principle remains that the workshop leader must establish contact with the participants BEFORE the workshop begins and should do as much as possible to create an atmosphere of enthusiasm for the workshop itself.

Summary

All participants should ideally be met before the workshop in order to:
- identify their existing views
- identify contributions they might make - or problems they might cause
- create enthusiasm for the workshop

2.4 Resources needed for the Workshop

This section does not cover the resources which are generally required for educational workshops. This is because it is assumed that the workshop leader will have experience of running other workshops. If this is not the case then very useful guidance, including a number of valuable checklists is available in the final section of the WHO Educational Handbook written by Jean-Jacques Guilbert. In view of this, this section only considers resources which are especially important for this particular workshop.

The first requirement is the right kind of space. The workshop will probably have between 15 and 30 participants who must be able to sit in reasonable comfort in a room where they can all see each other whilst they talk. So there must be enough space to allow for everyone to sit in a circle or in an oval. If you are uncertain about the size of a room try placing one chair for each expected participant in the formation which you intend to use.

This main room should of course be equipped with a board for holding flip charts (large sheets of paper of about 1 metre x 60 cm) and preferably an overhead projector. Naturally it must be possible for ALL participants to see the flip chart and overhead projector screen clearly and comfortably.

In addition to this main room there should be additional space for discussion groups or syndicate groups to meet. For every five or six participants there should be at least one space for them to meet. So you will need:

       3 spaces for 15 - 18 participants
       4 spaces for 19 - 24 participants
       5 spaces for 25 - 30 participants

The main room will probably be big enough to provide two of these spaces if the small groups work at opposite corners. Each of the spaces for small group work will need a table (for the chairman or reporter of the small group to record the meeting on large sheets of paper), five or six chairs and a supply of paper and pens. These small groups will frequently be reporting on their conclusions to the main group and so will need a way of presenting this information visually (a purely verbal report is completely unsatisfactory) so the large sheets of paper for the flip chart - or possibly overhead transparencies will be needed.

Because of the method of reporting, it would be desirable to have space in the main room to pin or stick the large sheets of paper to the walls or to a screen so that the reports can be displayed and referred to later in the workshop.

A number of the reports and conclusions in both the small groups and the overall main group will be worth preserving. So the workshop will need a secretary/typist to type these reports and duplicating facilities (possibly a photocopier) to prepare copies for each participant. It will of course be much easier if the secretary is available throughout the workshop and has a room with a typewriter, duplicator, etc. near to the main workshop room.

If the participants are to preserve these reports in a systematic way, so that they can be referred to later, they will need some form of filing system, preferably a loose-leaf ring binder. (Don't forget the hole puncher so that the sheets of paper can be put into the file.) One suggestion is that the loose-leaf file becomes a "portfolio" containing a record of all the work done during the workshop. If this suggestion is followed, the participants may wish to insert the pages from their printed manual in the portfolio and add their own personal notes.

Other resources needed for the workshop are the additional reference books which either the workshop leader or the participants might find helpful. For example, there should be several copies of "Continuing the Education of Health Workers". Other World Health Organization books which might be helpful include:

1. EURO Reports and Studies No. 6, 1979 (Continuing education of health personnel as a factor in career development: report on a WHO Working Group).

2. EURO Reports and Studies No. 33, 1980 (Continuing education of health personnel and its evaluation: report on the technical discussions at the twenty-ninth session of the Regional Committee for Europe, Helsinki, 1979, 1980).

3. WHO Technical Report Series No. 534, 1973 (Continuing education for physicians: report of a WHO Expert Committee).

You will also need to prepare some data as a basis for discussions of the needs for continuing education. In particular, up-to-date figures on morbidity and mortality should be available, as should any locally prepared reports or surveys on the way in which health care is provided or the effectiveness of the health care provision in the local area. The workshop leader has an important function in transforming the general pattern of this workshop which could be run in many countries, into a workshop which takes full account of local circumstances. Quite a lot of time will be needed to make sure that all relevant local documents are available, so it would be a good idea to involve a number of the participants BEFORE the workshop in trying to identify useful data.

Summary

Resources needed include:

- main room large enough for all participants to sit facing each other
- space for small group work
- board for holding flip charts
- overhead projector, screen, transparencies and pens
- large sheets of paper and pens
- tables
- secretary/typist, typewriter, duplicator/photocopier
- loose-leaf ring binders for all participants
- reference books
- a summary of the national Health Policy and National Health Plan
- data on morbidity, mortality, demography, health services facilities, health service utilization
- reports of any work study analysis
- curricula of training programmes
- Workshop Manual for each participant

2.5 Preparing for the Evaluation of the Workshop

Well before the workshop, the workshop team should be thinking about the types of evaluation activity which will be carried out.

In increasing order of importance this evaluation might involve:

- providing information to the World Health Organization
- providing guidance on improving the workshop
- encouraging the implementation of the plans formed during the workshop.

These are considered separately below.

The provision of information to the World Health Organization

This involves completing the questionnaire in Section 4.1 of the Leaders' Guide. The purpose of this evaluation is to identify ways in which the advice given in this book can be improved, to find out how many workshops have taken place and where and to make a very preliminary estimate of the impact which these workshops have had. Clearly the World Health Organization cannot insist on workshop leaders preparing these reports, but their cooperation would be very greatly appreciated.

Providing guidance on improving the workshop

This second aspect only applies where the workshop leader expects to be running a similar workshop, or will be in a position to advise others. If this is the situation, then the workshop leader will want to get as much guidance as possible from the participants about how the workshop can be conducted more effectively. Where should more time be spent - and where less? Which exercises were most helpful and which least? How can the less helpful exercises be improved? Guidance on how to obtain this information is given in the notes for Day 5 in the Leaders' Guide.

Encouraging the implementation of plans

This third aspect of evaluation is really the most important. This is concerned with the consequences of the workshop, in other words, with what happens afterwards. Certainly if nothing happens then the workshop has been a waste of time.

The need to evaluate the outcome of the workshop is based on two quite
different reasons. The first is the usual argument that there is a need to
know what happens and to find out how effective the workshop has been in
stimulating development. The second argument is quite different. This is
that if the participants are involved in the evaluation process then this will
in itself increase the probability of the participants becoming actively
involved in developing the system of continuing education. (Note that this
technique by no means guarantees that changes will take place - it simply
makes it more likely.)

The basis for this evaluation of outcomes should be the "Plan of Action"
prepared on Day 5. In essence, the workshop leader should find out from each
participant at appropriate times whether the Plan of Action is being
implemented. Have the various things happened which the workshop group agreed
should happen? This is supported by discussions to find out the reasons why
some things have been possible and why others have been more difficult to
achieve. The aim of this evaluation therefore is to stimulate the process of
change and to learn more about the factors which control whether change occurs.

The way in which this evaluation is carried out will of course depend very
much on the enthusiasm of the workshop leader for doing this work, and on the
very many local factors (ease or difficulty of communication, the relationship
between the workshop leader and the participants, etc.) Therefore detailed
guidance would be totally inappropriate. However whatever procedure for
evaluation of outcomes is followed, it should be agreed by the participants
and possibly be based on their suggestions.

Some suggestions for evaluation are given below. (It is recognised that
it will never be practical to follow ALL of the suggestions, so the various
ideas should be selected and adapted to suit local circumstances.)

1. Hold a follow up workshop after six months or so to review what
    progress has been made.
2. Write to each participant after a few months to ask how their ideas
    have changed or what they have done.
3. Write a newsletter on continuing education based on the work by
    members of the workshop.
4. Form working groups to implment continuing education.
5. Appoint one of the workshop participants to do 1. and/or 2. and/or 3.
    and/or 4.

SECTION 3

CONDUCTING THE WORKSHOP

This section provides guidance on conducting the workshop as outlined in the timetable and exercises described in Sections 2 and 3 of the Workshop Manual. This guidance is based on experience of conducting similar workshops. However no two situations are alike and no two groups of workshop participants are the same. Therefore the guidance is meant to be flexible and not to straightjacket any group - it is not a set of instructions which guarantees success.

It may also be worth stating again that the timetable and exercises should be adapted - possibly substantially - to suit the specific needs of the local situation.

The section is organised by days. There is an overall commentary provided for each day which is then supplemented by comments on specific exercises which take place on that day.

A series of general guidelines on educational techniques are provided in Sections 3.6 to 3.10.

3.1 Day one

0900: The amount of time allowed for registration, welcome and introduction is limited to one hour on the assumption that the participants will not have to travel far to the workshop on the Monday morning and that at least the majority of participants will know each other fairly well. If these assumptions are not true a later start must be planned, or more time must be allowed. If this happens then the timetable for the rest of the day must be adapted accordingly.

During the registration period you should check whether all expected participants have arrived, whether they have all the papers which you will want them to use and whether there are any problems over accommodation.

If the participants do not know each other well, you might introduce pairs of participants who have not met before or know each other only slightly. Then ask them to interview each other as if they were newspaper reporters.

Some questions they might ask are given below - but they should not ask questions which they would not be willing to answer themselves.

- What do you like most about your work?
- What are some of the things you probably do best at work?
- What are some of the things you don't like about your position and job?
- What are some of the things you would like to be doing better in your job?
- If you were starting out your career - do you think you would end up doing the same things? How might things be different?
- What are some of your hobbies? What kind of things do you like to do with your spare time?
- How helpful do you think participants in this workshop could be to each other?
- What are you most looking forward to from this workshop?

If time is available ask the reporter to introduce his interviewee to the group. The pair can then swap roles. The atmosphere should be lighthearted and informal, so to help this you might set the mood by members of the workshop team introducing participants. Between one and two minutes should be allowed for each of these introductions so it is a time-consuming process, though it is time well spent for a group where the various members do not know each other well. It is certainly more effective then asking each participant to introduce himself or herself.

The welcome to the workshop may be carried out by the workshop leader or, if it seems appropriate, by some senior member of one of the health professions or a senior member of the Ministry of Health. If an outside speaker is chosen, it will be important to offer some suggestions about the key points to be made in the welcoming speech. These will of course vary very much depending on local circumstances, but might include an expression of the Ministry of Health's commitment to develop continuing education.

The introduction to the workshop should include some description of the kind of contribution expected of the participants. They should know that they are not there to listen passively but to take an active part in discussions and in formulating plans. Another point is that the workshop is not an end in

itself but must be seen as a stimulus to action. This may also be a good time to give recognition to those participants who have already been involved in continuing education programmes. Finally you might check that all participants have made the commitment to take part in _all_ of the sessions of the workshop and you might explain how important this is.

The remaining sessions have fairly detailed notes given with each of the activities. Provided activities run to schedule, no further guidance seems necessary. The problem remining is whether the activities will be completed by your group within the time limits. You will have to make decisions about whether it is better to complete a few of the activities thoroughly or do all of them more superficially. You may be able to extend the time available by arranging an evening session, though obviously the participants must be in full agreement with any change in the timetable.

The day's sessions should close with a request that they read Technical Papers Numbers 3 and 4 in preparation for the following day's work.

3.1.1   Exercise 1

This exercise starts by defining what is meant by "Continuing Education". As described, the participants make their own decisions about what should be included within this term. This could lead to difficulties and so you may prefer to provide a definition in advance.

Preparation for this session will include providing sufficient copies of the table in the exercise (one per workshop participant at least). In addition, it will be useful to prepare large versions on flip charts or else to provide overhead projector transparencies with the basic structure on, so that the groups can complete their tasks jointly and present the results of their discussion.

This session should be a fairly relaxed beginning to the workshop in which people get to know each other and become more confident of expressing their ideas. This process can be helped by the workshop team responding positively to suggestions made and by ensuring that all participants have an opportunity to express themselves in the group discussions.

3.1.2   Exercise 2

Do read the general notes on brainstorming (Section 3.6). The two key points for you as the leader are that during the second stage you must be _fast_ - record all suggestions as quickly as possible (in a single word if you can) and move on to the next suggestion. In this way the flow of ideas can be maintained. The second point is that you must be _firm_. Do not permit _any_ discussion or debate about any suggestion - this will all come later. You should also be ready with your own suggestions to start the flow going again if it stops for any reason. For example, have they thought of drug company representatives, articles in the local newspapers for the general population, radio or TV programmes, meetings with supervisors, meetings with patients or clients, etc. Have they thought of the different agencies and the different methods.

When it comes to the categorization at the end it might be worth grouping the suggestions under headings and using a sheet of flip chart paper for each heading. Suggested headings are given below:

1. Type of education method, e.g. courses, radio programmes, journals.
2. Agency providing the educational activity, e.g. ministry of health, drug company, faculty of medicine.
3. Topics, e.g. control of diarrhoeal disease.
4. Recipients (people who took part), e.g. health inspectors, nurses.

These categories do overlap slightly (where would you put "supervision"?), but this weakness is not too important.

Preparation

The only materials that you need are either the overhead projector (plus several transparencies) or, preferably, a few large sheets of paper with appropriate pens.

Finishing the session

The endpoint is a list of current activities. This should be typed up and distributed as a handout if possible. The results in this form will be very useful in the first session during the afternoon when the current provision is critically considered.

3.1.3   Exercise 3

Any session after lunch is likely to have a slightly more drowsy group of participants than at other times of the day. You may feel that there is a less ready response from the participants than you hoped and so you might fall into the trap of talking too much. The better approach is to do more asking of questions, possibly make slightly outrageous suggestions so that someone will be tempted to argue with you. Do try to ensure that as many people as possible take an ACTIVE part in the group discussions.

A series of statements have been suggested for discussion. You may well feel that other features of continuing education systems are more urgent or relevant in your situation - so you should adapt the list as necessary.

In preparation you should provide large sheets of paper for each group with the statements written down the lefthand side allowing space for comments on the right.

When conducting the review session you should draw attention to the areas where agreement/disagreement occurs and attempt to resolve differences. You should also point out that the agreed statements form a very general specification for the type of continuing education system which the group intend for their country. Future exercises will build on these conlusions.

3.1.4   Exercise 4

You should run this brainstorming in just the same way as the morning session, so you will need the same materials and you will need to think of suggestions to start the flow of ideas going again. You must also keep the pace going in just the same way - if someone starts to say "I think I know a place where if the lease runs out, as I think it will, in six months time, then ...", then you must stop this and just ask the person to name the building.

When it comes to classifying the resources it might be useful to do this under the following headings.

1. People or agencies who might provide facilities, equipment or money.
2. People or agencies with expertise or skill to offer (either as teachers or as health workers).

3. Facilities such as buildings or equipment or a capacity for printing or
    communication (e.g. a radio station).

It is important to provide a conclusion to this session. This should take
the form of a typed handout listing the various resources. You should also
review what has been done during the day, i.e. briefly summarise the key
points of each session.

Finally you should explain that the next day will see the beginning of
planning for what will be done in the future. To prepare for this they should
read Technical Papers 3 and 4.

3.2 Day Two

This day consists of only two exercises. As the length of an exercise
increases it becomes more difficult for the workshop team to manage the
exercise. There is a greater risk of not completing the work, or of groups
going in quite the wrong direction. On the other hand there is an equal but
different danger of supervising so tightly that the participants resent your
interference. It will probably be valuable for a member of the workshop team
to be attached to each of the groups as they work to help the chairman of the
group keep more or less to time.

The day's activities are described in detail in the notes below for each
of the two exercises.

The only remaining point is to ask the participants to prepare for Day 3
by reading Technical Papers Nos. 5 and 6 so that they will be able to take
part in the exercises.

3.2.5   Exercise 5

(a) Explain in the introduction two key points

   (i) This is now the beginning of formulating policy (i.e. by looking
        at needs) and so this exercise is very much starting to look at
        what will actually be done in the country.

(ii)   Whilst the analysis of needs during the morning cannot be
       complete, it does establish a pattern of thinking

       | identify needs | → | what teaching can meet this need |

       rather than

       | what could be taught | → | how can I justify this. |

       It IS important in Continuing Education to think in the
       direction of | needs | → | provision. |

(b)   You should have available the back-up data needed for this exercise.
As far as possible you should provide:

1.   Any national or local policy documents which indicate that a change
     is to take place (or should have recently taken place) in the ways in
     which health care is provided.

2.   Data on morbidity and mortality for the country or local area.

3.   Information concerning the number of each category of health worker –
     together with job descriptions.

4.   Any surveys or analyses of the quality of health care or opinion of
     conmsumers which have been carried out locally. This may include
     data about water supply, food production, housing conditions, etc. as
     well as the more usually available date on the incidence of disease.

5.   Curricula for training programmes.

6.   Reports of any interviews conducted with health workers.

(c)   A danger point in this exercise is the time when the groups
separate. It is very easy for them to spend a lot of time discussing who will
be chairman and how they will work and carefully reading any data you
provide. This slow process should be speeded up by you. If you feel it is
appropriate, appoint chairmen and secretaries yourself, help each group to get
the first row completed so that they have a model of how to proceed.

(d)   Sit in on each of the groups. Listen to how they work. Notice who
has the ideas. Check that progress _is_ being made at a sufficient speed and if
necesssary help the groups to produce appropriate tables.

(e) Check that the column "What needs to be learnt" is in the form of learning objectives (ie. what the learner will be able to DO - such as "persuade village leaders that a supply of clean water can be installed by the village people" or "maintain hand pumps in a serviceable condition") rather than in the form of topics (e.g. water supply systems).

(f) In the reporting session you must ensure that time is well spent. There is half an hour for each group to report and have its work discussed. Try to avoid spending more than this time on any one group.

(g) During the reporting session try to show how the different perspectives lead to different statements of need and different learning objectives. Ask whether there is a conflict between the various perspectives. Ask whether some perspectives have not been considered in the exercise (note that patients and health workers themselves have not been asked what they see as being important!).

(h) It is well worth the trouble of arranging for the results of this session to be typed, duplicated and distributed to all the participants.

(i) Finally, it is entirely appropriate to modify this exercise. Use four groups instead of three. Set up groups to look at needs from different perspectives. The workshop should be adapted to suit your needs and the needs of the participants.

3.2.6   Exercise 6

Your initial task in this exercise is to explain in more detail what is required of the groups and to organise the participants into the suitable groupings. It does not matter too much about the exact size of the groups though groups of less than five or more than eight might present difficulties.

During the group discussions it is important to provide a little - but only a little - guidance. For example, you should not be advising on what the policy should be, though you may well be asked whether it is appropriate to include some aspect or asked about how much detail to give. In order to answer these questions you should be familiar with at least some of the policy statements produced locally so that you know the local requirements.

You should also help the groups to manage time so that they will produce a document by the beginning of the 9 a.m. session on Wednesday. You may also need to help groups to start putting their ideas on paper and to then move on to consider the next point, since it is often a weakness of small group work that there is difficulty in reachig unanimous agreement and without this complete agreement the group becomes unwilling to record anything.

The 4 p.m. review session should be cancelled if you feel that the participants will not be willing to continue their work during the evening.

The session to report the document should not aim to collate the various documents into one which is acceptable to all participants - an hour would be far too short a time for this. Instead each of the policy documents should be accepted, though you should ask the participants to draw attention to serious differences between documents and try to find why the different groups hold different views. You should also ask the participants to look for inconsistencies within a document. Perhaps the most difficult task will be to ensure a sufficient level of detail so that the policy document is more than a bland vague general indication of good intentions.

Again it will be valuable to have each of the policy documents typed after they have been presented. These should of course be distributed to each of the participants.

3.3 Day Three

The day starts with a reporting session for Exercise 6 - which is described under the notes for Day 2.

The two main exercises for this day's work could each take several days of hard work. So your major problem will be to let the participants realise that even the small amount of time spent in these exercises has been worthwhile.

One alternative you might consider is for half the group (possibly made up of those people more concerned with management and policy) to tackle Exercise 7 only, whilst a second group (possibly made of those with more expertise in educational methodology) to do Exercise 8. This would allow more time for each of the exercises and would be quite feasible as the two exercises are independent of each other.

Whether you choose this alternative or not, your main concern throughout the day will be:

(i) To help the groups manage time, by letting them know how much time is available and by helping them get through the preliminary stages of group work as quickly as possible.

(ii) Ensuring that the group work is along the right lines, by checking regularly to see what has been produced.

(iii) Emphasizing the need to link whatever is done in Day Three to the policy document produced in Day Two. You must make sure that the group see the importance of the sequence.

Analysis of Needs/Problems

↓

Policy

↓

Programme

↓

Implementation
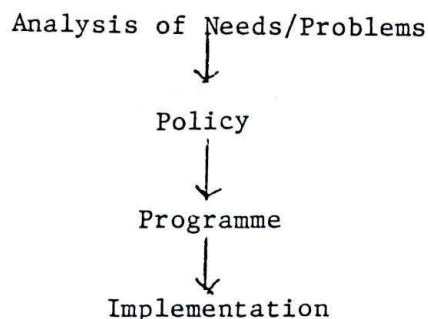
(iv) Maintaining a purposeful approach during the review sessions. As was the case for the policy document, the aim cannot be to reach unanimous agreement; the aim must be to identify where agreement exists and to identify where differences lie - and possibly the reasons for these differences.

The review session at 1630 may well be cancelled if you feel this is appropriate. Its sole function is to check that each group is making progress and to give ideas for the evening's work. If you feel that the groups won't be working in the evening, the review is unnecessary.

At the end of the day you should remind participants to read Technical Papers in preparation for Exercise 9 on Day Four.

3.3.7   Exercise 7

Yous should introduce this session by drawing attention to the two types of activity involved in a continuing education system - as explained in the commentary for Day Three.

The exercise then starts by participants working in pairs. These pairs should probably be drawn from within groups which worked on the Policy Documents, so that they are not   ?   to different policies.

The main preparation required is to provide a large number of large sheets of paper reproducing the table in this book, so that you can record the responses of the participants. Probably several sheets of paper will be needed, rather than trying to fit the whole table onto one sheet.

The other preparation is to think through the list of activities and try to identify examples of each activity which already takes place or should take place in your area. You might also check whether there are activities currently taking place which do not fit any categories in the table and so require an extension to the list.

Again it is important to summarise the session and provide some kind of record. So the final table of activities and resources should be typed, duplicated and distributed.

3.3.8   Exercise 8

You might like to introduce this session by pointing out two things:

1.   The group attending the workshop may be primarily interested in organising and establishing a system. Yet the whole point of the system is to provide education - and so it is worthwhile to explore what is involved in planning these educational activities.

2.   Although the wide range of possible teaching or learning methods is often referred to, most people in practice think in terms of "refresher courses". It might be worth insisting that alternative methods are considered.

The procedure for this exercise is fully described in the Workshop Manual -
and need not be repeated here. The only additional point is that you may have
to provide support to the groups if they are willing to continue into the
evening.

3.4 Day Four

This day moves on from a consideration of the activities which the system
will be involved in, to a discussion of how these activities can be
organised. Although it is said elsewhere, it is worth repeating that this
structure must be consistent with local ways of doing things. Most of the
necessary functions can be predicted from a distance; the way in which the
functions are organised must be a local matter.

3.4.9   Exercise 9

This exercise is very similar in style to the previous two exercises and
so your role is much the same, i.e. helping groups to manage time and keeping
them to the point and acting as chairman for the review sessions.

There is little less pressure during this day as only one exercise is
attempted. This is to allow a slightly more relaxed debate about issues for
which there can be very few "right" answers. Probably the group will have a
lot of experience of organisational structures from their own work and will
regard themselves possibly as more expert in this exercise than in others. So
the pace is a little slower to allow more time for debate.

3.5 Day Five

The main difficulty for you on this day is to decide how much time to
spend on the Plan of Action. This is the most important part of the workshop
and so must be done properly. However, the time needed will vary very much
depending on the circumstances. Factors such as how rapidly the group reaches
agreement and how far the development of a System of Continuing Education has
advanced both come into your decision.

If the workshop is held in a place where a system of continuing education is about to be established, then it may be worth spending the whole day on the Plan of Action (Exercise 12). This will of course mean that Exercises 10 and 11 have to be left out or scheduled for earlier in the week.

It is hard to imagine a situation where it would be appropriate to reduce the time allowed on the Plan of Action. This is because the Plan of Action is the critical link between talking in a workshop and taking significant action outside.

The evaluation of the workshop will also vary depending on the circumstances. Do you want guidance on how to run similar workshops better — or is this the only one? Have there been problems which you would like to allow the group to express? What information do you really need? Decide what purpose the evaluation will serve.

The method for workshop evaluation suggested in Section 3.9 of this Guide is very flexible and can be used to serve many purposes by ensuring that different statements are considered. But even though the method is flexible, there is no reason why you should not use an alternative method if this seems more appropriate to you.

Finally, on this day, it is possible that a number of participants will want to leave early. It is worth finding out in advance whether this is the case. If people do want to leave then you should try to reduce the disruption as much as possible by scheduling an earlier close. It is especially desirable that the Plan of Action exercise is not disrupted, so this might be moved to the morning.

3.5.10   Exercise 10

The grouping suggested for this exercise is only one possibility — but it has been chosen so that each group is complementary to the others. Other groupings would tend to overlap more in the work to be done. However you must decide what grouping will be most appropriate in your situation.

The groups may not have organised their own brainstorming sessions before, so you should review this technique with them if necessary. It is worthwhile pointing out that to obtain the benefit of the technique it should be followed quite rigidly.

In the review session it is probably less important to identify the poor suggestions and delete them, than it is to try to identify gaps and remedy these deficiencies.

3.5.11   Exercises 11

This is a fairly straightforward exercise where your role will as usual be to:

   (i)   help the groups manage the time available
  (ii)   provide advice on request
 (iii)   ensure that the suggestions made for data to be collected will
         actually be helpful in answering the question or reaching the
         decision.

One problem that the groups will have to face is that for some questions it will not be feasible to collect all the data that one would ideally require. This is inevitable and you should reassure the groups that it is quite common to have to make decisions on the basis of insufficient information.

One option if time permits, is to review the suggestions for data collection by estimating how much it will cost to collect the data (in terms of time and resources) and then ask whether the data is worth collecting at that cost.

3.5.12   Exercise 12

As mentioned elsewhere, this is the crucial exercise of the whole workshop. Yet the time available is very limited. You may decide to extend the time. On the other hand, if only 90 minutes are allowed, the discussion must be purposefully led.

When should Brainstorms be used

This is not a technique for making decisions or calmly evaluating different options or for preparing well structured arguments. It is simply a method of generating ideas and possible solutions. Other techniques should be used to decide whether the ideas or solutions can be used.

Therefore it should be used from time to time in business meetings or management teams when suggestions for solutions and new ideas are needed.

3.7 Leading a Small Group Discussion

Why Small Group Sessions?

The fundamental reaons for using small group sessions stem from an understanding of how people usually learn. Information which is only heard is rapidly forgotten. For longer-term retention of information or skills, the information must be processed and used by the learner. It should also be related to what the learner already knows and the value to the learner of learning the information should be realised by the learner (i.e. the learner should have an incentive to learn). A relaxed and informal atmosphere is also more likely to lead to genuine learning than a threatening or stressful environment.

These conditions can be achieved to some extent in lectures, but when small groups are well conducted, the conditions for learning can be much more favourable.

How to Conduct Small Group Sessions

The overriding principle is to attempt to maximise these conditions which favour learning, i.e.:

(i)   processing of information or practising skills;

(ii)   relating information or skills to what is already known;

(iii)   relating information or skills to what the learner wants to be able to do in the future.

(iv) a relaxed informal atmosphere.

This can be done by using the following techniques:

(a) Set the objectives of the sessions (either independently or in discussion with the learners) so that what is to be learnt involves what the learners have recently heard, read or experienced. The essence is to APPLY what has already been partially learnt rather than to cover new ground.

(b) Control the degree of participation of each of the members of the group.
Make sure that all members do participate and that no members dominate the discussion. This is because the exercise of actually formulating opinions and putting them into words is a powerful learning experience. Therefore all should have this experience.
This can be done by directing questions to those who are taking part less than the rest and inviting the more talkative to wait until the others have had a chance to speak. Much depends on the manner in which this is done.

(c) Set a reasonably well defined endpoint. This will help to make the discussion more purposeful and structured, so that it is easier for the learners to relate what is being said to their previous knowledge.
This can be done by asking for:
(i)   a list of recommendations;
(ii) a list of advantages and disadvantages;
(iii) a decision;
(iv) appointing one of the learners as a secretary to note down the major points on a board or chart as they are made.
(The secretary may need help in doing this.)

(d) Maintain the relevance of the discussion by asking questions such as:
"Is that idea consistent with your experience"?
"Do you think you will be able to use that idea in your future work"?, etc.

(e) Clarify the discussion by:

    (i)   asking one learner to summarise what another has said;

  (ii)   asking learners to identify whether comments are facts or opinions;

 (iii)   where clear errors of fact occur, correct these;

  (iv)   refer to the "secretary's" summary of points made from time to time;

   (v)   keeping comments on the main theme of the discussion.

(f) Preparing material for discussion in advance.

This may involve preparing sheets of data, or reference material for the learners to discuss.

It will certainly involve preparing for yourself a list of the major points which you feel should be covered and generally being familiar with relevant facts and commonly held opinions.

(g) Preparing the environment.

All participants in the discussion should be able to see everyone else's face and be close enough to hear each other comfortably.

The environment should also be friendly and relaxed.

If students do not know each other they should be introduced.

The mood should be reasonably lighthearted yet purposeful.

There should be no fear of exposing ignorance.

(h) The leader should say rather little.

The style of asking questions is vital.

Questions such as "Well, what do you think about that"? can be so open-ended that a nervous student will be intimidated. So it may be better to start with a more closed question such as "Do you agree with what has just been said"? and then follow this up with "Why do you (not) agree"? The simple question "Why"? can be very effective in encouraging confident students to clarify what they have said. It can be terrifying to more nervous students.

Above all the discussion leader must NOT give a lecture.

Purposes of Small Group Sessions

1. Generally NOT to introduce new facts.

2. To teach the application or evaluation of facts or ideas which have already been introduced.

3. To develop skills of expressing ideas and formulating arguments.

4. To change attitudes (since attitudes are often effectively changed when learners express their own ideas - rather than listening to other people's ideas).

3.8 Using Charts or Overhead Projectors

Overhead projectors are one way of showing an audience either words or diagrams. They have some advantages over the more conventional chalkboard or blackboard and every effort should be made to make an overhead projector available for the workshop. If an overhead projector cannot be made available, then some of the education points mentioned in the final section also apply to charts.

Basic Techniques

The overhead projector allows you to face the audience whilst writing on a transparency. This permits the teacher to maintain better "contact" with the audience than when he has to turn his back to write on a chalkboard or a chart.

It also lets the teacher leave a pencil on the transparency to point out a particular word or part of a diagram, whilst continuing a discussion.

The dangers are that the teacher may get between the projector and the screen (and cause a shadow), try to write too much on one transparency (and so make the writing illegible), or stand between some of the audience and the screen (and so obscure their view).

Avoid these dangers and use some of the techniques described later and you have a pwoerful devise for improving the quality of communicationn.
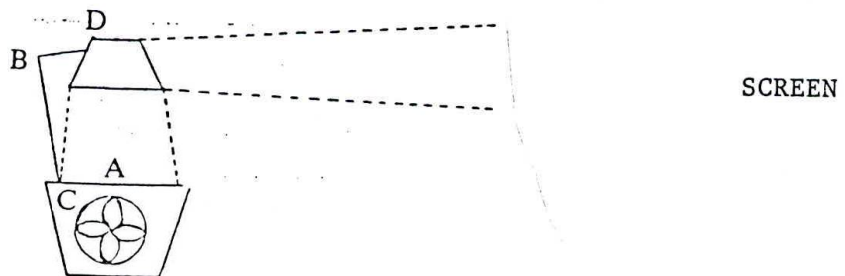
Summary

Face the audience whilst writing.

Leave a pencil to point out key words.

Don't cast shadows or obscure the screen.

Write legibly and large enough for visibility from the back of the room.

TECHNICAL POINTS

The transparent plastic sheet is placed on the project at A. Light shines through this transparency and is focussed by a lens at D and then projected onto a screen.

1. ## Focussing

    The image on the screen is focussed by turning a knob at B which moves the lens D up or down.

2. ## Image size

    The size of the image on the screen is changed by moving the projector nearer or farther from the screen. The image should be as large as possible.

3. ## Height of image

    The image is moved up or down by adjusting the angle of the lens box D.

4. Shape of image

If the image looks like ⬡ or ⬡ then move the
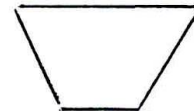
projector sideways towards the side of the image which is
longer. Make sure your image is more or less square. An
image shape is caused by projecting slightly upwards onto a
vertical wall. Ideally the screen should be sloped forwards
at the top towards the audience. Often this is not possible
so some distortion of shape must be accepted.

5. The fan

The light bulb gets very hot and so has to be cooled by a fan (C). Check
that this is working whenever the bulb is switched on. (Some models have
a thermostat so the fan only starts when the bulb gets hot after a few
minutes use.) Usually the fan should be left running after the light is
switched off to help cooling.

6. Moving the projector

Do not move the projector until 10 minutes or so after use. The reason is
that the very hot light bulb is very fragile and could be damaged by even
quite a gentle bump. Wait till the bulb is cool, when the filament of the
light bulb is rather less fragile.

7. Pens

Pens are of two types – water soluble and spirit based. The water soluble
type are more common and they allow the teacher to wipe off what is
written on a transparency so that it can be used again and again. The
spirit-based pens give a "permanent" mark, although even this can be
removed using alcohol or methylated spirit.
Keep pens damp and cool – otherwise they dry out and become useless. A
refrigerator is a good place to store them if you have one handy. Always
keep the cap on the pen to prevent it drying out.

8. Light bulbs

Whenever possible take a spare light bulb for the projector as these do have only a limited life. Make sure you know how to change the light bulb.

Educational Points

The overhead projector extends the range of things that a teacher can do. Some of these ideas are given below.

(i) Structure presentations

Write down the main points to be covered in a session on a transparency before you start the teaching session. Then show this whilst you make the points. This will help to keep you on the topic and will help the audience follow the structure of what you are saying.

(ii) Prepared diagrams

You can take plenty of time drawing diagrams carefully on a transparency before the teaching session. The time is well spent because the diagram can be used time after time. Beware of trying to put in too much detail and of making writing too small.

(iii) Reporting from groups

You can give each of several groups a transparency and a pen. They can then write down their opinions, recommendations, suggestions, etc. Then these can be projected and shared with other groups. In this way the overhead projector can be used to help different groups of learners communicate with each other.

(iv) Structuring a discussion

When a group is discussing some issue it is easy for people to start going off the subject. This tendency can be reduced by writing down the topic - and the part of the topic which is being discussed. As conclusions are reached, they can be recorded and so in this way it is easier for the whole group to keep together.

These are obviously just a few suggestions for using the overhead projector. The main limitation to its scope is your own imagination.

3.9 Evaluating Workshops

When you are evaluating workshops - or any educational activity, you should look at three aspects:

-   the plan ... i.e. the objectives, the programme, the decisions about methods, etc.
-   the process ... i.e. what actually happened, and the immediate response.
-   the product ... i.e. what was learnt and the effect this had.

This guide is concerned solely with evaluating the process. Just one of the many possible methods of doing this is suggested.

The aim of this method is to find out what all the participants feel about the issues which they see as being important.

The Procedure

Stage 1

Describe to the participants the procedure outlined below and the aim of this method.

Stage 2

Ask each participant to write down a few statements about the workshop. They should be encouraged to write down the things which they feel are most important. The statements should be fairly specific. For example, the statements should be fairly specific. For example, the statement "The workshop was good" is not nearly specific enough. The way in which it was good should be expressed, so for example a more useful statement might be "The stated objectives were appropriate to my needs".

It does not matter whether the statement is thought to be true - or the opposite of the truth - since this is dealt with in Stage 4. This means that an equally suitable form of the statement above would be "The stated objectives were NOT appropriate to my needs."

Stage 3

Record the statements on a transparency or a chart. At this stage they should be discussed with regard to whether their meaning is clear - but NOT with regard to whether they are true.

Always there will be a lot of overlap between statements from different members of the group, so a lot of statements can be left out without losing important ideas.

The statements should be written so that there is space for 5 columns to the right of the statements. These columns are used in Stage 4.

Stage 4

Voting. When the statements are clearly written and understood the participants are asked to decide whether they strongly agree, agree, have no opinion, disagree or strongly disagree with each statement. They vote by showing hands and you must insist that hands are raised HIGH to make your counting easy and quick. To help the voters, you should make sure all have decided on their opinion BEFORE you ask for the first group who "strongly agree" to raise their hands.

You now have a record of how everyone felt about the issues which were seen as important by the participants. If you wish you can insert some statements which you would like the participants' opinion on.

The crucial thing now is to learn from this evaluation and use it to make the next workshop better.

SECTION 4

AFTER THE WORKSHOP

When the workshop is completed, it is tempting to relax and enjoy the completion of the task. However, if the workshop has succeeded in its objectives then it is only one stage along the route to the establishment of a system of continuing education. There are several things which the workshop team should do to help this process.

One is to prepare a very brief report on the workshop based on the questionnaire in Section 4.1. This should be sent to WHO if possible. You might also like to send reports of the workshop to relevant local agencies (any agency which sent a participant for example) to create publicity for the concept of continuing education.

The second is to continue to discuss with participants their reaction to the workshop and to identify ways in which the workshop could be improved.

Thirdly - and most important - is to fulfil all commitments made in the Plan of Action and to assist in making sure that all other participants also fulfil their commitments. In this way the workshop will indeed have achieved its prime objective of assisting in the establishment of a System of Continuing Education.

4.1 A Questionnaire

This questionnaire is designed to be completed by the leader or team of a workshop on continuing education.

The purpose of the questionnaire is to provide guidance to WHO on the extent to which the manual "Continuing Education of Health Workers - Workshop Manual" has been used. The questionnaire will also help WHO to estimate how useful the manual is and how it can be improved.

Please do complete this questionnaire as it will be most helpful. Please post it to:

> Dr A, Mejia
> Chief Medical Officer for Health Manpower Systems
> Division of Health Manpower Development
> World Health Organization
> 1211 Geneva 27, Switzerland

The Workshop

1. Where was the workshop held? Country: _____

    City/town: _____

    Institution: _____

2. How many participants were there? _____

3. How many days did the workshop take ? _____

4. Which organization sponsored the workshop? _____

5. Who selected the participants? _____

The general response to the workshop

1. Did participants in general feel that the workshop had been:
Very successful / fairly successful / of some value / a waste of time.

2. Did the workshop team find the "Workshop Leaders' Guide" helpful? How could it be improved?

Comments:

3. Do you feel that specific changes will result from the workshop (such as a system for continuing education will be established or strengthened)? Please comment.

4. What follow-up to the workshop is planned by you - or by workshop participants?

Your reaction to the Manual

1. Did you find that the timetable and exercises were practical? (For example did you follow the suggested timetable and did you use the exercises?) If problems occurred, please mention them.

2. Did the participants find the Technical Papers useful? Please comment on which were most/least helpful and why.

3. Did you use any teaching methods which you have not tried before? If so, what methods did you use and what is your reaction?

4. Please give any comment on how the Manual could have been more useful to you.

PART II (a)

Workshop Timetable and Commentary

Introduction

The timetable provided in this section is for guidance only. It has been designed to guide the problem-solving process of the workshop; so methods are suggested and amounts of time proposed; topics for debate and questions to be answered are put forward. But all of these suggestions depend on a number of assumptions about the kind of country where the workshop is taking place and the people who are taking part. Therefore it is entirely right - even essential - for the workshop team (possibly after discussion with the participants) to change this timetable, and even the length of the workshop. For example, at a very simple level, the workshop day is timetabled from 0900 hours to 1700 hours. This will be quite reasonable in a number of countries, but in other places it may be better to have a longer break in the middle of the day, or to start earlier. Simply because this printed manual suggests 0900 to 1700 hours does not mean that this will be the best time for you.

Another area where changes may be made is the content of the exercises. For example, on Day 2 there is an exercise on "preparing a policy document". In countries where a policy for continuing education has already been agreed, this exercise should be substantially changed, perhaps by concentrating on examining the existing policy document. Or perhaps the exercise should be deleted to allow more time for other activities.

Because of these factors each workshop should be different. The following timetable and commentary are only the basis from which the workshop team can develop a programme which is relevant and appropriate to the specific place where the workshop is held.

The overall pattern of the Workshop is as follows. It starts off with a general consideration of the importance of continuing education and the current state of continuing education locally (Day 1). Then the specific needs for continuing education are considered which in turn leads to a policy for continuing education (Day 2). For this policy to be implemented more consideration needs to be given to the activities planned and the resources which they require (Day 3) and the kind of organizational structures and mechanisms which will enable these activities to happen (Day 4). The evaluation of these activities and structures is an important element of the whole process and is considered on Day 5. The final session provides a bridge or link between the workshop itself and the real world by involving the workshop group in planning their own activities during the next few months which will lead towards a fully effective system of continuing education.

By the end of the day, the group will probably have:

- got to know each other better and begun to establish effective patterns of working in the context of the workshop.

- recognised that continuing education is of great importance in ensuring adequate standards in providing health care, and that continuing education is also of great importance in improving standards or in changing the way in which health care is provided.

- become more fully aware of the kind of continuing education which is currently available locally and made constructive criticisms of what is currently done

- realise where facilities and people exist who could be used to improve the provision of continuing education.

In summary, the day will have clarified the nature of the problem which exists and identified the resources and constraints which should be taken into account in finding solutions to the problem.

DAY TWO

WHAT ARE THE NEEDS FOR CONTINUING EDUCATION?

0900   Exercise 5 - What Continuing Education is needed in this area?

1100   Break

1130   Reporting Exercise 5

1300   Lunch

1400   Review - "What is meant by a policy document?"

1430   Exercise 6 - Preparing a National policy document for Continuing Education

1630   Summarizing progress on the policy documents

1700   Close of formal session

           Group work to continue in the evening.

DAY TWO

Commentary

The Overall Purpose

During Day 2 the emphasis changes from a consideration of what IS happening at the moment, to thinking in terms of what SHOULD be happening in the future. Put another way, the emphasis is changing from identifying the PROBLEM to an exploration of some kinds of SOLUTIONS.

The first session (Exercise 5) is concerned with the kind of things which health workers should learn. It is very easy to say "Continuing education is very important" or "We should organise in-service training". It is rather more difficult to be precise about what should be learnt during the continuing education. Yet it is this more difficult task - i.e. specifying what should be learnt and who should learn it - that you are asked to undertake.

The way in which the exercise is designed will mean that the different groups working on this task will have slightly different points of view. This is because a secondary purpose of this exercise is to help you realise the different groups will have different ideas about what needs to be learnt -- and so there is a need for coordinating the ideas of these different groups in a system of continuing education.

diff cadres.

The afternoon session (again) asks you to undertake an impossible task[1]. Policy is not defined and formulated in one afternoon. Even so, it is possible to begin to explore and discuss the kinds of policy which would be appropriate for your country or area. To help you begin this Chapter 4 gives some guidance and examples of policy statements. These are not intended to be a guide to what YOUR policy should be; rather they give examples of some of the issues to be considered. You must really consider what kind of policy is needed in your situation. Simply because a particular policy is followed in one country, does not mean that it is right for your country.

Whilst your proposed policy document should be realistic (i.e. it should not for example imply that 20% of the health budget be spent on continuing education), it is obviously not the final policy document which will be endorsed and put into

effect. Therefore it is not essential that all members of the working groups are unanimous in their support for each of the ideas contained in the document. This exercise is a way of stimulating purposeful discussion about policy; it is not the final decision-making process.

<u>By the end of the day, the group should have:</u>

- recognised that data from morbidity/mortality statistics may not lead to the same conclusions as a study of health policies and plans or a study of the field situation.

- identified some specific skills which health workers need to improve and made some estimate of the scale of the training needs in terms of the number of health workers involved.

- begun to formulate a policy for the type of continuing education system which will be appropriate for their particular situation.

DAY THREE

FROM POLICIES TO PROGRAMMES

0900   Reporting the policy documents prepared in Exercise 6

1030   Introducing <u>Exercise 7</u> - <u>What Management Activities will the system of Continuing Education be involved in?</u>

1100   Break

1130   Exercise 7 - group work

1230   Exercise 7 - review

1300   Lunch

1400   Introducing <u>Exercise 8</u> - <u>Preparing an example of an Educational programme for the System of Continuing Education</u>

1430   Exercise 8 - group work

1630   Exercise 8 - review

1700   Close of formal programme

Group work to continue in the evening where appropriate

DAY THREE

Commentary

The overall purpose

Day 3 starts by thinking a little bit more specifically about what is actually
going to happen in your country or area.

Day 1 was spent in looking at the issues of Continuing Education in general and
reviewing the present state of affairs. Day 2 led to a statement of general
intention (the policy document). Today these general intentions are translated
into some specific proposals for the activities and programmes which will be
undertaken within the system of continuing education.

At this point it should be stressed that there are two rather distinct types of
activities which are involved in the overall process of providing continuing
education. The first is the general system or management activities which would
involve such things as the coordination of participating agencies, mobilization of
resources, budgetting or the provision of educational equipment. These are clearly
essential supporting operations in order for any continuing education to occur.

The second type of activities involved in the implementation of the system is
purely educational. For example, it may have been decided that primary health care
operations do not proceed as expected or that prescription of antibiotics is not
appropriately carried out. So an educational programme must be designed to try to
improve these situations. The educational programme may include teaching sessions,
or it may be based on written materials.

The separation of these two types of activities cannot be taken too far,
however, since in practice they overlap and interact.

Exercise 7 is concerned solely with the management activities. Obviously the
time available is insufficient to do this thoroughly to the level of detail where
the activities and programmes can be implemented. Rather, the point of this
exercise is to increase awareness amongst the group of the range of activities
which must be considered in designing, operating and evaluating a continuing

education system and to consider the very broad balance needed in their country or area. For example, one of the activities suggested in Technical Paper 5 is to write manuals. So the workshop group should think through whether there is in fact a need for manuals for the health workers in their area. If manuals are needed, can they be written and printed locally? Are manuals of greater priority than other possible activities?

In the afternoon, Exercise 8 goes on to consider some of the specific issues involved in planning an "Educational" programme.

By the end of the day, the group should have:

- recognised the wide range of management activities which are involved in a System of Continuing Education - and made a preliminary estimate of which activities are locally important and of the resources required

- followed through the process of planning an education programme and realised the wide range of educational strategies available.

In summary then, the day is spent in working out what the policy document will imply in practical terms of specific programmes and resources required.

DAY FOUR

ORGANIZING THE SYSTEM OF CONTINUING EDUCATION

0900   Exercise 8 - presentation of group work and review

1100   Break

1130   Exercise 9 - Organizing the system of Continuing Education

1300   Lunch

1400   Exercise 9 - continued

1700   Close

DAY FOUR

Commentary

The overall purpse

Having decided what kinds of activities and programmes will be undertaken within the system for continuing education during Day 3, the purpose of this day is to define the kind of organisational structure which will be neded in order to support these activities.

The beginning of the day is spent in reviewing Exercise 8 and the whole of the rest of the day is spent in group work on Exercise 9 - organising the system of continuing education.

The organisational structure for a system of continuing education does matter. The system will need to carry out a number of functions and therefore a mechanism is needed for funding, liaison between institutions, selection and follow-up of trainees, etc. Without this mechanism these initial functions will not happen or will be very inefficiently carried out.

However the organisational structure must fit in with existing organisations and the local culture. So it is impossible to lay down an ideal structure which will suit all situations. The purpose of this day is to allow the group to reach their own conclusions about the type of structure which will be appropriate for them.

DAY FIVE

EVALUATION AND PLANS OF ACTION

0900   Review of Technical Document - Evaluation

0930   Exercise 10 - What questions should an evaluation answer?

1100   Break

1130   Exercise 11 - What data will be needed in the Evaluation?

1300   Lunch

1400   Exercise 12 - Preparing a Plan of Action

1530   Break

1600   Evaluating this workshop

1700   Close

DAY FIVE

Commentary

The overall purpose

This is the final day of the workshop and so the most important function of the day is to link the workshop to what is going to happen afterwards. The direct link between the workshop and the future is the Plan of Action prepared during the first half of the afternoon. However, as this link is so important, it may be decided that more time - up to the whole of the day - should be spent in preparing the Plan of Action.

The schedule for the morning is to complete two related exercises on evaluating the System of Continuing Education. Evaluation is widely recognized as being important, yet it is only important if it is designed in order to achieve worthwhile ends, such as reaching decisions or answering questions. Therefore the starting point of evaluation is to decide what the ends are - the main part of Exercise 10.

Once it has been agreed what questions the evaluation should answer it often becomes clear what data should be collected (though it may not always be feasible to collect as much data as one would like). The data to be collected is considered in Exercise 11.

Possibly the most important activity of the whole week is Exercise 12 - Preparing a Plan of Action. This should be a plan outlining the series of events following the workshop. Because this is so important, it may well be desirable to reduce the time for Exercises 10 and 11 - or even omit them altogether.

The Plan of Action should be a statement of what the workshop group actually intend to do over the course of the next few months in order to move towards an effective (or more effective) system of continuing education. It will be this plan (and the way in which it is followed) which will transform the workshop from just talk into significant action.

PART II (b)

Exercises

Exercise 1

Is Continuing Education Important?

Rationale

Probably all participants at the workshop believe that the Continuing Education of health workers is important. Yet it is likely that others in the health system do not share this view or else believe that only a very small proportion of the health budget should be spent in this area. Therefore the starting point of this workshop is to review how important continuing education really is and possibly to identify some of the arguments which can be used to support claims for increased recognition of the importance of continuing education.

Another reason for starting the workshop in this way is to allow the different workshop participants to get to know each other a little better and to begin to establish ways of working together as a group.

End-Point

The end-point of this exercise will be the different groups' answers to a series of questions about Continuing Education. These answers may reflect differences in the opinions of the different groups. So they need not be finally agreed by the whole workshop group. Where agreement does exist then this can provide some of the basis for future policy proposals concerning continuing education.

References

Chapter 1 of Part I explains some of the purposes of continuing education which are often presented.

Further discussion of the needs for continuing education can be found in Chapter 2, Part I.

Procedure

The whole workshop group should be divided into three smaller groups giving between five and ten people per group.

Each group should have a chairman either designated by the workshop leader or selected by the group itself. The chairman's job is to help the group stay on the topic being discussed, encourage all members of the group to participate (without one or two members dominating the discussion), and keep the discussion moving so that all issues are discussed in the time available.

It will probably be useful to appoint a secretary/rapporteur who will keep notes of what is agreed.

Stage 1

Each group should agree what they wish to include within the term "Continuing Education". In particular they should decide whether to include or exclude each of the following:

add more

- supervision
- informal conversations between health workers
- activities of drug companies in advertising and promoting their products
- post-graduate courses leading to further qualifications

Stage 2

Each group should identify their group response to each of the following statements One way of doing this is for each member of the group to complete the table individually. Then for the group to attempt to reach an agreement afterwards.

Statements	Not applicable or not true	True but not important	True and very important
1. Some health workers do not make best use of the health care resources which are available			✓
2. Continuing education can improve the way in which health workers do their work			✓
3. Health workers are promoted before they are sufficiently prepared for the new job.			✓
4. There have been significant changes in health policy in the last few years.			✓
5. There is a need to reorientate the competence of some health workers.			✓
6. The standards of health workers tend to become lower over the years.			✓
7. Health workers often want to learn more about their work.			✓
8. Initital training of health workers is sometimes inappropriate			✓
9. Not enough money is spent on Continuing Education			✓
10. CE can be a complete effort, waste of time, money			

Additional statements may be added by the group.

Stage 3

After the break, each of the three groups should present their report in the form of a large sheet of paper with their responses to the statements marked. The initial presentations should be restricted to a maximum of five minutes to allow other groups to comment and debate the issues.

Conclusion

At the end of the presentations the different groups may well have reached some agreement about their response to the various statements and possibly added some further comments. These agreements can be typed and distributed as a record of the session.

Exercise 2

What Continuing Education is Currently Available"?

Rationale

You have discussed in Exercise 1 whether continuing education is important. Now you should move on to review what is presently done in your area. Almost certainly there will be various things happening which will be new to at least some of the participants. It is important to be aware of all these continuing education activities in order to plan for the future, since any plan must take into account the current state of affairs.

Endpoint

At the end of this exercise the group should have a fairly complete categorised list of continuing education activities in the area.

References

Chapter 1 of Part I explains what is usually meant by the term " continuing education" in section 2. Section 5 describes some of the educational methods used. This may stimulate your thinking about the whole range of continuing education activities provided locally.

Procedure

The method suggested for this exercise is a "Brainstorm". This is not just a free-for-all where anybody can say anything; it is in fact a carefully designed activity which should be followed quite precisely.

It is important to follow the stages outlined below in a fairly precise way in order to gain the advantages of this technique.

Stage 1 - Clarify the Problem

The workshop leader will explain the issue to be considered, i.e. all of the activities which presently take place in your area which contribute to the continuing education of health workers. ALL activities can be recorded - not just formal courses.

Stage 2 - The Brainstorm itself

The participants call out any continuing education which is available to any group of health workers. Think of ANY way in which health workers learn - not just formal courses. There should be no debate, no evaluation, no rejection of any suggestion on any grounds. The workshop leader or his/her delegate records every suggestion as briefly and as quickly as possible on an overhead projector or on a large sheet of paper. Speed is important here to help the flow of ideas. This stage continues until no participant has any additional suggestions.

Stage 3 - Review

The suggestions are reviewed in order to:

(a) clarify what the suggestion means - sometimes what is recorded is too brief to be understood by everybody.

(b) decide whether to keep the suggestion in the list or not - sometimes the same suggestion is made twice or sometimes a suggestion is made which is inappropriate and not worth further discussion.

(c) make sure that the suggestion really does happen locally. For example, a suggestion might be "postgraduate courses". This review stage should list some specific examples of postgraduate courses which actually take place within the country.

Stage 4 - Discussion

In this stage the various suggestions could be categorized, if time is available.

Conclusions

The final list of current activities in continuing education can be typed up and distributed to the whole group. This will be a useful reference when considering, after lunch, whether the current provision of Continuing Education is satisfactory.

Exercise 3

Is the current provision of Continuing Education satisfactory?

Rationale

This exercise will consider the issue of whether there is a problem in the present state of Continuing Education or not. Of course if there is no problem, then the workshop can come to an early close' However, if there is a problem, then it is important to describe it as precisely as possible so that future policy and activities can help to solve that problem.

The purpose of this exercise is to identify the criteria for judging locally whether the provision of continuing education is satisfactory and to apply these criteria to the local situation.

Endpoint

At the end of the exercise, the group should have a list of statements describing the features of an ideal system of continuing education for this situation.

Beside each statement should be an assessment of how far that feature is true of the actual system of continuing education at present.

References

Chapter 2 - especially section 5.

Procedure

The workshop participants should be divided into three groups - possibly the same groups as in Exercise 1. Again a chairman and a rapporteur are required.

Stage 1 (about 30 minutes)

Each group should consider the following statements and decide whether they are acceptable as descriptions of an ideal system of continuing education. Statements may be deleted, or new ones added. The statements are:

1. The system should have a unified approach.
2. The continuing education system should be closely related to the health system as a whole.
3. Continuing education should be realistically available to every health worker (including all female health workers).
4. Continuing education should emphasise the skills and attitudes required by health workers in their daily work.
5. Continuing education should lead to improvements in the way health workers perform their health care tasks.
6. Continuing education should be provided throughout a health worker's career.

Stage 2 (about 30 minutes)

When an agreed amended list of statements has been prepared, the small groups should rate how far the ideal is achieved. So for statement 3, if the group feel that 20% of all health workers can realistically take part in continuing education, then 20% can be put by statement No. 3. Other statements can not be rated in terms of numbers so it is better to use categories such as:
- not at all achieved
- only slightly achieved
- usually achieved
- completely achieved

Stage 3 (about 30 minutes)

The small groups report their conclusions to the whole workshop. Each report should consist of the groups agreed statements plus their assessment of the current state of continuing education as a percentage or verbal rating.

Conclusion

This session is likely to reach agreement on some desirable features of a continuing education system and to indicate the present state of affairs is not entirely satisfactory.

These conclusions will be useful in thinking about what kind of policy (Day 2) is required in order to improve the situation.

Exercise 4

"Are there resources for Continuing Education which are underused"?

Rationale

You will probably have found many weaknesses in the provision of continuing education in your area during the previous session. Some of these will be the inevitable consequence of limited resources such as money, space, transport, time, etc. However it is also likely that in your area there are some resources which are not being used to the full. So this session is intended to start you thinking positively about the resources which are available, rather than the problems.

The list of resources will be helpful in identifying ways of improving the provision of continuing education.

Endpoint

A list of locally available resources for continuing education which might possibly be used in a future system of continuing education.

Procedure

The brainstorming technique will be used again in the following stages:

Stage 1 - Clarify the problem

The main problem here is likely to be interpretation of the word "resources". This is intended to include people, buildings, equipment, money (or people/agencies who might provide money, transport, etc.). In short, anything or anybody who might be useful in continuing education.

Stage 2 - The Brainstorm

As in the previous branstorm no comment or discussion is allowed. This might be a difficult rule to follow when somebody makes a suggestion which you know is impossible (e.g. they might suggest a building which you know has just been allocated for a different purpose or is due to be knocked down in 6 months).

However great the temptation, leave any kind of comment until the next stage. Concentrate instead on any ideas which lead on from previous suggestions (e.g. you might know of another building where there is some vacant space).

Stage 3 - Review

The suggestions are reviewed in order to:

(a) clarify exactly what resource is described, e.g. "radio" might be the initial suggestion. The review should clarify which radio station or what other type of radio is intended. If possible a contact person should be identified.

(b) make sure that the resource actually does exist and could be made available.

Stage 4 - Discussion

The various suggestions might usefully be categorised into - (for example) -

- sources of money
- buildings and institutions
- equipment for teaching/printing, etc.
- people who would be able to teach
- communication methods, etc.

Conclusions

At the end of this session, there should be a list of under-used resources, which can be typed and distributed. This will provide a useful reference when considering ways of improving the continuing education system.

Exercise 5

What Continuing Education is needed in this area?

Rationale

Most effective planning starts with the recognition of a problem. During Day One, the problems associated with continuing education (or the lack of it) in your area were discussed in general terms. Today the aim is to define the problems in a little more detail and to move on to the preparation of a policy document which will outline how these problems are to be solved.

In this exercise you will be asked to define what continuing education is needed. This will be described in terms of what a particular group of health workers need to learn, who and where they are and how many need to learn.

This task of defining what needs to be learnt can be approached from a number of different starting points. For example, it can be started by studying morbidity and mortality data. This may show, for example, that over the years the incidence of "preventable" disease has not changed and this finding may therefore stimulate questions about why no substantial improvement has occurred. This in turn may suggest ineffective immunization programmes and a consequent need to learn how to maintain the cold chain.

Another starting point is the observation of health workers in the field. From this observation one might notice common practice which is less than ideal. Another way to identify problems is to look at recent developments in the past, e.g. oral rehydration, or planned changes for the future in health policy in order to achieve Health For All by the Year 2000/Primary Health Care. With this background one can often deduce particular skills which will need strengthening and so require additional training.

Using these three different starting points (health data, policy and field observations) some examples of what health workers need to learn can be deduced. These in turn provide the specific evidence about the need for continuing education. This in turn can be used in the policy document (Exercise 6) both to justify the value of a system of continuing education and to indicate the scale of educational programmes required.

Endpoint

At the end of the exercise each of three groups will have prepared a table similar to the one below.

Evidence of need/problem	What needs to be learnt	Which health workers	Number	Where
1. Continued high incidence of tetanus, whooping cough, measles. Survey showing vaccines ineffective.	How to operate cold chain, especially maintenance of refrigerators	Medical Assistants, Auxiliary Nursing personnel	420	Health centres through-out the country
2.				

Each group should have completed several rows.

The work of the three groups can be added together to form a larger table for typing and distribution.

References

Chapter 3 in Part I provides a background to the process of identifying needs. It is not essential to read this before doing Exercise 5, but it does provide important guidance for the time when the full assessment of needs is carried out.

Working references during the exercise will include:

- Morbidity and mortality data plus any reports describing health problems.
- National health policies and plans together with possibly job specifications.

- Training curricula
- Any data available from work studies or health system research carried out locally. Also any reports which may be available from interviews with health workers or surveys on their attitude towards Health For All by the Year 2000/Primary Health Care.

Procedure

The method suggested for this exercise is the technique called "Syndicate Groups". This involves dividing the overall task into parts and assigning each part to a different syndicate group.

Stage 1 (about 5 minutes)

Discussing the general problem to make sure that all participants are clear about what is required.

Stage 2 (about 5 minutes)

Dividing the participants into syndicate groups. In this exercise, the grouping should not be done randomly, but done in such a way that each of the participant's experience can be used to the full.

Three groups are suggested. The first will consider needs from the points of view of the statistical data available and so should include people whose work involves an overview of health of the area - these may include statisticians, community health specialists, public health inspectors, etc.

The second group should consider the national or area policies for health and identify the consequent needs. This group again should include people with a broad view of health in the area but must include some who have a responsibility for formulating or interpreting policy.

The third group should consider the evidence from the field and the observation of health workers. Of course there is not enough time in the workshop to go out and observe directly, so this group must include participants with their own immediate experience of working with colleagues in the field. They will have to rely on memory rather than observation. This group should include any supervisory staff together with participants who are themselves field workers rather than administrators or managers.

Stage 3 (about 90 minutes)

The groups now work independently to prepare a table on large sheets of paper.
The headings for the table are:

Evidence of need/problem	What needs to be learnt	Which health workers	Number	Where

The first thing to do is to fill in one or two examples in the need or problem
column. This might be "The International Drinking Water Supply and Sanitation
Decade" which has resulted in a major emphasis on the provision of water supplies
and basic sanitation. From this you might work out that one of the consequences
was that "70 medical assistants working in comparative isolation would need
training in how to assist villages to install a water supply."

To consider needs you should consult any data relevant to the group, such as
morbidity and mortality figures, health policies, and plans, etc. When studying
the data try to identify problems and trends. For example, does the health data
show a satisfactory state of affairs or is the incidence of preventable diseases
too high? Has the health policy changed - and if so have all health workers been
satisfactorily prepared for their new role in its implementation? Are job
specifications for new roles consistent with the training curricula? (In one
country a major element of the job description for a particular category of health
worker was "Managing the resources and personnel of a health centre". Yet the
curriculum only devoted 10 hours in a three-year programme to management.)

Is the performance of the health workers in the field actually consistent with
the job description? Could the standard of work be improved? Should different
work be attempted?

It is important that the groups do not aim to be complete in this exercise. They can only hope in the time available to provide some examples. Therefore they should aim to complete as many rows as possible, rather than give a comprehensive list of needs without looking at the remaining columns.

The working methods for each group cannot be spelt out in detail. However, do remember that brainstorming may assist you. Do not spend more than 20 minutes talking before writing down the first row on the table.

Stage 4 - after the break (about 90 minutes)

The three syndicate groups return and present their findings which are discussed in a plenary session (i.e. all the participants together). Each group should be allowed up to 15 minutes to present their report. This will then leave about 45 minutes for discussion.

This discussion should aim to tidy up the lists by:

(i)   making meanings and wording clearer
(ii) removing examples which have previously been given by other groups
(iii) possibly (if time is available) adding to the list of examples.

Conclusion

The combined list of needs and learning implications can be typed and distributed. Examples of learning needs will be used in Exercise 8.

Exercise 6

Preparing a National Policy Document for Continuing Education

Rationale

Earlier exercises considered the existing provision of continuing education, the deficiencies of this provision and the need for continuing education. Exercise 3 also considered what features of a continuing education system are desirable. Now is the time to bring these ideas together in the form of a proposed national policy document. (If the workshop is at sub-national level then the policy should be for the area from which the participants are selected.)

The group of participants in the workshop is most unlikely to have any statutory authority to prepare policy documents for the area, so this exercise may seem to be a little pointless. However there is merit in the group trying to formulate a policy so as to obtain an overview of how a complete System of Continuing Education might work in the area and also to provide a basis for subsequent groups with the necessary authority.

Policy documents can take a variety of forms. Therefore it is right for the workshop to prepare a policy document which is consistent with local methods. However there is some guidance in Chapter 4 about the contents or issues to be described. Use this as a guideline, but if there seem to be good reasons for doing something different, do not be inhibited by this guidance.

The policy document is important since it provides a general framework for all activities in continuing education - and for the duration of the workshop all future exercises should be consistent with the policy document that you prepare in this exercise.

Endpoint

Groups will prepare a written policy statement about the provision of continuing education.

References

Chapter 4 of Part I provides guidelines for what should be included in a policy document. It also provides a number of examples of statements of policy (which do not always conform to the guidelines.)

Any available existing local statements of health care policy, health manpower policy or training policy should be consulted.

Procedure

In this exercise the workshop participants should be divided into groups of about six people. Each group will then prepare their own policy document during the afternoon - and possibly evening. They will then report at a plenary session on Day Three.

The groups should be matched as far as possible so that each group has a similar composition in terms of professions, seniority and who they work for. Obviously it will not be possible to achieve an exact match and indeed this does not matter. However the groups should be broadly similar as they will each be attempting the same task.

The groups should work fairly independently so that at the review session different policies may become apparent and can be compared. On the other hand, this is not a competition so it may well be appropriate for a member of one group to help another group if specialist advice is needed.

Conclusion

The review session on Day Three is likely to show both some differences in points of view as well as areas of broad agreement.

These areas of agreement (which have been derived from an analysis of the needs of the health system) should provide the basis for considering in more detail what kind of system of continuing education is required. This more detailed study will take place in Exercises 7 and 9.

Exercise 7

What Management Activities will the System of Continuing Education be involved in?

Rationale

Activities in a system of continuing education are broadly of two types. The first type is concerned with general maintenance or development of the system - examples of these types of activities include coordinating the different institutions in the system or provide financial support to different items of the general educational programme. A list of some of these kinds of activities is given in Chapter 5. These are clearly very general in nature and will be necessary support for any specific teaching programmes which take place.

The other type of activity is the purely educational activity. Typically, a group of health workers is identified and a fairly specific need is recognised. This then forms the basis for a programme of educational activities which may include meetings, workshops, manuals, courses, etc. The two types of activity can be called "Managerial activities" and "Educational activities" for the sake of convenience.

In this exercise you are asked to think about the management activity, whilst in Exercise 8 you will outline an educational activity.

Chapter 5 gives a list of some of the management activities which systems of continuing education might be involved in. The questions which you are asked are:

(i)   What management activities should be planned?
(ii) How much effort and resources should be put into each of these activities?

Endpoint

At the end of this exercise there should be a list of management activities which the group feel should be undertaken by the system of continuing education.

For each activity there should be an indication of whether the activity is initial or continuing, how much resources should be devoted to the activity and possibly some specific example of what the activity will involve.

References

Chapter 5 of Part I discusses these management activities. In particular Section 3 describes each of the activities in turn.

Procedure

The overall pattern for this exercise is started by working in pairs. After this the pairs join together forming groups of four people to discuss and reach agreement on their combined point of view. Finally, the groups of four review their conclusions in a plenary session.
In more detail:

Stage 1 (about 20 minutes)

The group is divided up into pairs. Each pair should then read or review Chapter 5 to ensure that what is meant by the suggested activities is understood. Additional activities may be suggested at this stage.

Stage 2 (about 40 minutes, after the break)

The pairs aim to complete the following table:

Activities	Initial/ Continuing	Resources (Man Years)	Example
1. Identify current activities			
2. Identify needs			
3. Create awareness			
4. Coordinate			
5. Finance			
6. Central facilities			
7. Train teachers			
8. Produce materials			
9. Prepare manuals			
10. Coordinate reassessment			
11. Liaise with Supervisors			
12. Define Curricula			
13. Provide continuing education			
14. Select learners			
15. Provide feedback			
16. Evaluation and research			

The column headed "Initial/Continuing" should be completed by just putting in the letter I or C to indicate whether this is an activity which only needs to be done when the system of continuing education is being established, and so is an Initial activity (I), or is something which continues at more or less the same level of intensity for a number of years, and so is a Continuing activity (C).

It is important to consider the amount of resources required for an activity, before deciding whether it is worth doing. This should be summarised in your table by the number of man years needed every year (or, for an "initial" activity, the total number of man years). So if you think it would take two people about three months full time to do one of the activities record $2 \times \frac{3}{12} = \frac{1}{2}$ under the resources column. If you think it would take seven people about half of their time throughout the year then record $7 \times \frac{1}{2} = 3\frac{1}{2}$. If you think the activity should not be done at all put "0" in the resources column.

Obviously manpower is not the only important resources, but for the purposes of this exercise ignore all other resources - you will need to think about them more in Exercise 8.

If you have time record an example of what would be done. For example, if you think manuals should be written note down the title you would give to the manual and which health workers it would be intended for.

Stage 3 (20 minutes)

Each pair joins another pair to form groups of four. They should try to reach agreement on the amount of resources for each activity.

Stage 4 (30 minutes)

Review the results in a plenary session. The chairmen of the plenary session will attempt to record the feeling of the group about the level of resources needed for each activity - but if there is a clear difference of opinion which cannot be quickly resolved, then the chairman should simply record both opinions.

Conclusion

This exercise will have drawn attention to the wide range of activities associated with continuing education and will have given some indication of the importance of each activity as seen by the group.

Exercise 8

Preparing an Educational Activity

Rationale

In the last exercise you considered "management activities". In this exercise your task will be to plan an "educational activity".

Part of the purpose of this exercise is to illustrate that planning an educational activity is much more than deciding on a teaching method (though this is both very important and often poorly done). This process will need to be repeated by a system of continuing education for each educational activity.

End Point

The outcome of this exercise is an outline of an educational activity which will meet one of the training needs defined in Exercise 5.

References

The issues to be considered in planning the educational activity are outlined in the procedure for this exercise. Further guidance in this area can be obtained from "Continuing Education for Health Workers" prepared by the Training Department of AMREF and available from the African Medical and Research Foundation, P.O. Box 30125, Wilson Airport, Nairobi, Kenya.

Procedure

Stage 1 (10 minutes)

The exercise is introduced and the general ideas of planning an educational activity are reviewed.

Stage 2 (5 minutes)

The participants should be divided into groups of about six people. For this exercise, the same grouping as was used in the policy document preparation exercise might be appropriate.

Stage 3 (90 minutes + 15 minutes break)

In groups the participants should set out to answer the following questions:

1. What needs or problems is the educational programme intended to solve?
    (It would be sensible here to take one of the problems or needs identified in Exercise 5.)

2. What will the health workers need to be able to DO in order to solve the problem?
    The answer to this question will in effect be the learning objectives of the educational programme. This stage also will probably use the results of Exercise 5.
    It is essential that this question is answered in terms of the learner's PERFORMANCE at the end of the course, rather than in terms of what they will know or understand, or the topics to be covered. The process of working out what needs to be covered in the course comes much later.

3. How many health workers will be involved, what kind of health workers are they and where are they located?
    Again this is a review of the conclusions of Exercise 5.

4. Are the problems, the performance and the personnel identified for this programme consistent with the policy document?
    If the groups in this exercise are the same as the groups which prepared the policy document, they should consult their own document. If not, then this stage may be omitted, although it should be recognised that checking with the policy document is an important part of programming.

5. What is the overall strategy for providing educational experience?
    This is a key question and one which calls for imagination and educational expertise. Some options that might be considered are:

    (i)   Organising a workshop of the health workers concerned to discuss whether they recognise that the problem exists. Then using the workshop to find the solutions suggested by the health workers and training the health workers themselves in educational methods so that they can help to improve the performance of their colleagues.

(ii)   Preparing a manual to define the performance required and explaining how it can be achieved. Then calling a meeting of the health workers' supervisors and training them how to observe whether the performance has been achieved and how to help the health workers develop this aspect of their work.

(iii) Arranging a series of courses which will be available to all health workers who wish to attend.

(iv)   As for (iii), but making attendance compulsory.

The range of possible strategies is enormous. They vary considerably in potential benefits as well as in their cost, so this stage will require a lot of thought and maybe a brainstorming session within the group would be a good way of starting this stage so that ideas can be generated for later discussion.

6. <u>What existing resources are available which will be helpful in following the chosen strategy?</u>
Here reference to Exercises 2 and 4 will probably be helpful.

7. <u>What will the proposed programme cost?</u>
It is desirable here to obtain an overall picture of the financial cost of the programme - but there is little point in working this out in detail. If you can give a figure with an accuracy of plus or minus 30% this is certainly adequate at this stage.

It is quite legitimate (though perhaps confusing) to calculate the cost in quite different ways and thus obtain quite different figures. What is important is that you are clear about the method used and that you state it. For example, in a programme which uses supervisors as teachers, some costing exercises will include their salary as part of the costs. Other people would argue that the supervisors will be paid whether the programme takes place or not and therefore will omit their salaries.

Probably the best way to proceed is to list all substantial resources required under the headings of people, space, transport, materials and equipment. Then allocate a cash figure to each of the resources according to the local accounting practice.

8. <u>When will the programme take place?</u>

    The group should identify the key stages in the programme and decide a date when each stage will be started and completed.

    It is easy to be over optimistic about times, yet if too much time is allowed then unsatisfactory health care will continue for longer than necessary. So a <u>realistic</u> assessment of the shortest possible time is called for.

9. <u>How will the programme be evaluated?</u>

    This question will be answered in much more detail in a later exercise, so at this stage only a very brief answer is needed. Essentially the answer to this question is to find out whether the original problem has been solved. In this exercise therefore, you should give a brief indication of the evidence you would need in order to decide whether the problem had in fact been solved or reduced. Do not go into details about how the evidence would be obtained, since this is dealt with later.

<u>Stage 4</u> (30 minutes)

The programme for the different groups are presented, reviewed and discussed.

<u>Conclusion</u>

It is hoped that the groups will better appreciate the scale of effort involved in providing continuing education to large numbers of health workers. It is also hoped that a variety of different educational strategies will be suggested.

Exercise 9

Organising the System of Continuing Education

Rationale

Organisational structures do matter. At one extreme, programmes can be successful where they are in effect run by one person who has the drive and expertise to make the programme work. However, in this situation, the programme is often totally dependent on that one person and when the person leaves the programme, the programme itself declines. So some organisation is needed to make the programme less dependent on individual leaders.

At the other extreme programmes can be so heavily organised in a bureaucratic way that all individual initiative is stifled by rules and regulations. Some middle course is required. Suggestions about the nature of the organisational structure are provided in Chapter 7.

The aim of this exercise is for the group to consider the suggestions in Chapter 7 and to decide which suggestions are appropriate to their own situation. In this way they should prepare their own plan for the organisation of the system of continuing education in their country or area.

Endpoint

The different groups should each produce their answers to the series of questions provided below. This will in effect be a proposal for the kind of organisational structure and mechanisms needed to support a system of continuing education. This proposal should be appropriate for the country in which the workshop takes place.

This proposal will be useful in guiding the plans of action which participants will follow after the workshop.

References

Background information on organisational structures is provided in Chapter 7.

Procedure

Stage 1   1130 - 1145   Introduction.

The exercise is introduced and the general ideas of organisation structures are presented.

Stage 2   1145 - 1215   Reading in pairs.

The Chapter is read by pairs of participants who should ask each other about points which are not clear and briefly discuss which points seem especially important in their own situation.

Stage 3   1215 - 1300 and 1400 - 1500   Working in groups to answer the questions listed below.

Again, the same groups as prepared the policy documents should meet together to discuss the organisational structure which will be appropriate to their policy document.

The discussion should be centred round answers to the following questions:

1.   Where will the money and resources come from?

> By this stage some very general idea of the total budget will have been formed - and so initial ideas of the sources of money and resources should be discussed. What will the Ministry of Health be asked to provide? Will existing educational institutions make contributions of staff, space, or other resources? Will the health workers themselves be expected to pay anything? Will other agencies make any contribution?

2.   To whom will the system of continuing education be accountable?

> Presumably all agencies who make a contribution to the system in terms of resources or money will wish to have some say in the way these resources or funds are used. Will this be done through an overall management committee which supervises the work of the system and which has representatives of each of the contributing agencies? Or will some other structure be desirable?

3. Will the people working in continuing education be employed by a separate Continuing Education Unit (or similar title) or will they be employed by a range of other institutions?

4. If a Continuing Education Unit is planned, will this be part of the Ministry of Health, or part of some other agency (such as a medical school or college of health sciences) or will it be independent?

5. How will liaison be maintained between the various agencies involved (e.g. the Ministries of Health and Education, training institutions, professional associations, other organisations providing health care, etc.)?

6. Will the System of Continuing Education be centralised in one location or will it be distributed widely over the country or area as a whole?

7. Who (which individual or which group) will be responsible for planning and coordinating the day-to-day activities of the system?

These questions are intended to provide a framework for discussion. They should not be thought of as all the questions which need to be answered, so groups should be free to debate additional issues. Nor should it be assumed that all of the questions are necessarily relevant to every situation or that they can be completely answered at this stage.

Stage 4   1530 - 1700   Review

After a break from 1500 - 1530, each of the groups should present their findings and review them. The review - as in previous exercises - should identify:

(i) whether the proposals are consistent with the policy document and with programmes planned (i.e. is it likely that the organisational structure will tend to help in implementing the policy?)

(ii) where the proposals from the different groups show agreement and
where they show differences.

(iii) the reasons for differences where they occur. Note that there is not
very much point during this workshop in trying to resolve any
differences since this is only intended as a stimulus to ideas.

Conclusion

This exercise has taken as its starting point the needs for continuing
education in your country and the types of functions or activities which you expect
the system of continuing education to undertake.

From this base you have derived some ideas about the kind of organisational
structures required. This should provide the basis for what will actually be
implemented after the workshop.

Exercise 10

What Questions should an Evaluation Answer?

Rationale

Chapter 9 on Evaluating a System of Continuing Education outlines the reasons why evaluation is necessary and, in general terms, how evaluation can be carried out. Obviously this can only be done in general terms in the document and equally obviously the general suggestions of the document need to be adapted in each individual situation. The purpose of this exercise is to provide an opportunity for the workshop group to begin this process of adapting ideas to the local situation.

As the document points out, the word "evaluation" is used to mean "the process of collecting data, presenting that data in a convenient form and using the data to form judgements or reach decisions ...". There is a point of view which says that the data collection process should be very open and any data should be considered. This exercise is based on the different assumptions that the data should be collected with a definite purpose in view. (Both points of view can be justified and each have different merits. However, the purposeful collection of data does not prevent evaluators being conscious of all sorts of data and taking them into account. So the emphasis here is on the purposeful collection of data.)

The starting point for evaluation is therefore to decide what questions need to be answered or what decisions will have to be made. This then leads on to planning what data will need to be collected in order to answer the questions or reach the decisions. Exercise 10 stops at the point of deciding the questions whilst Exercise 11 goes on to look at the data needed.

One approach in deciding on the questions is to consider WHO needs to make the decisions or answer the questions. Probably the Ministry of Health will want some estimate of the overall impact of the system. Managers within the system will want to know how the various activities and procedures are going, so that they can modify them. Teachers will want to know the effect of the various educational programmes so that they can systematically improve their teaching methods over a period of time.

In view of these different groups and their different needs, it is suggested that three groups are formed corresponding to:

   (i)   the overall management committee
  (ii)   the managers of the system
 (iii)   the teachers/supervisors.

Then each group should think through the questions which they will want to be able to answer, and the various decisions that they will need to make.

Endpoint

At the end of the exercise there will be three lists of decisions to be made or questions to be answered by the evaluation process. These lists will correspond to the needs of different agencies - the overall managerial committee, managers of the system and teachers.

References

Background information is provided in Chapter 9. Specific suggestions about the kind of questions which evaluation can answer are provided in section 4.

Procedure

Stage 1 (5 minutes)

Three groups are formed to represent the points of view of:

- the overall management committee
- the system managers
- the teachers.

Ideally people should be allocated to groups on the basis of their likely future roles in the continuing education system - but this is not essential and may not be feasible.

Stage 2 (60 minutes)

Each group prepares a list of decisions which they might want to make (in their assigned roles as managers or teachers). They should also consider what questions they would want to be able to answer on the basis of the evaluation.

It may be useful for groups to first clarify the general nature of their task and to use the Brainstorming technique.

The groups should record their list as an OHP transparency or on a large sheet of paper.

Stage 3 (25 minutes)

The groups each present their lists of decisions/questions to the whole workshop group.

Conclusion

This list of questions/decisions will guide the next exercise in which the data to be collected in evaluation will be considered.

Exercise 11

What data will be needed in the Evaluation?

Rationale

As explained in Exercise 10, the starting point in evaluation is to decide what use will be made of the evaluation, i.e. what questions will be answered and what decisions reached. This will have been done in Exercise 10.

The overall purpose of this exercise is to work in the same groups and decide what data will need to be collected. For example, it may have been decided that one question was:

"Is the System of Continuing Education serving health workers in all

parts of the country"?

Probably you would decide that in order to answer this question you would need to find out the location for each health worker taking part in continuing education programmes. Or you might decide that it would be sufficient to collect this data for a random sample of 100 participants. In each case the data could then be summarised to enable the evaluator to answer the original question.

Endpoint

Each group will produce a list of the data needed for the evaluation process.

References

Types of data which might be collected are described in Chapter 9 - especially in Sections 4.2.1, 4.2.2, 4.3.1 and 4.3.2.

Procedure

The same groups as for Exercise 10 should be formed.

Stage 1

The groups should draw up a table as below.

Questions to be answered/ decision to be made	Data needed
1. Is the System of Continuing Education serving health workers in all parts of the country.	1. Addresses of the place of work for each health worker taking part in continuing education programmes.
2.	2. ....

Within the groups the whole list of questions/decisions can be shared out among the different group members. It is not necessary for the whole group to consider every question.

The review of this exercise could be done by each group displaying their results by writing down their findings on large sheets of paper and fastening these to the wall or a display screen. All participants could then look at each sheet in turn and make suggestions about additions or amendments to the group's reporter who stands by the sheet.

The reviewing process is completed by having each of the sheets typed, duplicated and distributed.

Exercise 12

Preparing a Plan of Action

Rationale

The whole point of this workshop is tnat it will lead to some action. A System of Continuing Education will be established, or the existing system will be strengthened. Without some such outcome the workshop will be an expensive waste of time. It will not be sufficient for the participants to have enjoyed the experience or for them to feel that they have learnt a lot. The workshop must lead to something happening.

In orde to make this more likely, the final afternoon is spent in preparing a "Plan of Action".

A "Plan of Action" is simply a statement of the events which one anticipates will take place in order to achieve an objective. For each event it is useful to specify a time when it should take place and also indicate who will be responsible for making it happen.

A useful layout - but by no means the only possible one - is given below.

Action or Event	Starting Date	Completion Date	Person Responsible
Report outcomes of work-shop to Minister of Health, Minister of Education ……….	October '85	-	Workshop leader
Establish a Working Group to formulate a Continuing Education Policy	November '85	-	Representative of Minister of Health
Working party formulates policy	November '85	1 January '86	Chairman of Working Group

The content of the Plan of Action must depend very heavily on the local situation and on what the workshop participants want to see.

Endpoint

The immediate end point of this exercise is a statement or plan of action which describes what the workshop participants intend to do after the workshop.

The longer term end point will be that the Plan of Action is followed and a system of continuing education will be established or improved in the participants' own country.

References

The background data for this exercise consists of the products of all earlier exercises - as these show the type of continuing education system required.

Procedure

Stage 1 (5 minutes) - Forming groups

Probably it is best to return to the same groups which formulated the policy documents. However it may alternatively be better for the whole workshop to work on a Plan of Action as a complete group. If separate groups prepare their own Plan of Action, then time must eventually be spent in combing the different plans into a single plan which is acceptable to the whole group.

Stage 2 (10 minutes - Defining the overall objective

The group should first agree on a suitable end point for the plan. This may be a fully operational system or it may be a more modest objective. However this must be agreed before the various stages required can be considered.

Stage 3 (30 minutes) - Listing the activities/action needed to achieve the objective

One of the problems at this stage is to decide how much detail is required. So it is suggested that the group starts by listing the major stages and then, if time permits, breaking these major stages down into more detail.

Stage 4 (30 minutes) - <u>Deciding on timing and responsibilities</u>

The amount of time needed to accomplish each stage should be estimated as realistically as possible and noted down. Obviously some activities can take place at the same time as others. Equally it will be essential for some activities to be completed before others can begin. These factors should be taken into account in specifying a plan which will achieve the objective as quickly as possible. The person or group to be responsible for each activity should also be recorded.

Stage 5 (15 minutes)

The exercise will be concluded in a plenary session. This should aim to produce an agreed plan of action, which represents the views of the workshop group as a whole.

Conclusion

It is important that this Plan of Action becomes the guide to action outside the workshop - and is not regarded as a purely academic exercise.

One possible consequence of the Plan of Action would be the establishment of a Continuing Education Centre within an overall organisational structure that guarantees close liaison with agencies responsible for providing health care, training institutions and the various health workers' representatives. However this is only one possibility and the Plan of Action must lead towards what the workshop group feels will be most appropriate.