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MAY 17 1986

May 23, 1986

RE: Cooperative Agreement:
DPE-3004-A-00-2018-00

Mr. Anselmo Bernal
Information and Training Division
Office of Population
U.S. Agency for International Development
Washington, D.C. 20523

Dear Al,

Attached is a copy of Ann B. Jimerson's report covering her trip to Mexico from March 31 - April 11, 1986.

Please indicate your approval of this report on the line below and return a copy of this letter to me for our project files. Once we have received your approval, we will distribute copies of the report to the AID Mission in Mexico and to other AID officials, as you request.

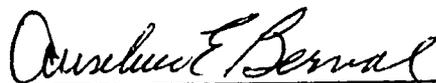
Thank you for your assistance.

Sincerely,



Patrick L. Coleman
Project Director
Population Communication Services

APPROVED:



signature

May 27, 1986

date

TRIP REPORT:

MEXICO COUNTRY PROJECT MONITORING

Prepared by: Ann B. Jimerson

Dates of In-Country Work:
March 31-April 11, 1986

The Johns Hopkins University
Population Information Program
Population Communication Services
624 North Broadway
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EXECUTIVE SUMMARY

The Johns Hopkins University/Population Communication Services (JHU/PCS) Media/Materials Coordinator, Ann B. Jimerson, visited Mexico from March 31 to April 11, 1986. The scope of work included: 1) reviewing the new structure proposed for the 20 training modules under development on the AMIDEM/IMSS (Mexican Academy of Demographic Research/Mexican Social Security Institute) project; 2) providing guidance in developing creative, attractive and effective visuals to accompany the modules; and 3) recommending and testing pretest methodologies.

During the visit, Ms. Jimerson worked with the Educational Division Team of IMSS. The team revised and pretested the proposed structure which will be applied to all 20 training modules and discussed needed revisions with the authors of the modules. They put together an alternative set of slides for one of the topics, human sexual response. A trial training session was held with IMSS trainees to determine whether the recommended pretest methodologies would be feasible and useful. The session showed that all four measurements--observation, pre- and post-evaluation quizzes, focus group discussion with trainees, and an in-depth interview with the instructor--will be effective as pretests. The team drew up a work plan to track the progress of all 20 modules as they are developed, pretested and revised.

Based on this visit, it is recommended that:

1. The education team work closely with the authors to assure that the modules follow the structure and format developed;
2. Emphasis be given to creating simple and visually-attractive slides;
3. Each module be pretested through two training sessions, using the four measures developed during this visit;
4. Each module be revised carefully, taking into consideration the various pretest results;
5. As the strategy for training of trainers is developed, the recommendations in this report be taken into consideration; and
6. JHU/PCS provide further training and support to the project, especially at the point where most of the modules have been pretested and the team is ready to revise modules based on pretest results. Support for such training is all the more important since the team is losing two members and their replacements lack experience in materials development.

INTRODUCTION

The Johns Hopkins University/Population Communication Services (JHU/PCS) Media/Materials Coordinator, Ann B. Jimerson, visited Mexico from March 31 to April 11, 1986. The purpose of the trip was to 1) review the new structure proposed for the 20 training modules under development on the AMIDEM/IMSS project; 2) provide guidance in developing creative, attractive and effective visuals to accompany the modules; and 3) recommend and test pretest methodologies.

AMIDEM/IMSS

In February 1986, AMIDEM/IMSS began implementation of a JHU/PCS supported project to develop educational materials which will be used to enhance ongoing training of the 58,000 medical and outreach personnel involved in IMSS' Family Medical System. For the first stage of the project, AMIDEM/IMSS will develop, pretest and produce the following materials:

- Family Planning Themes, a series of 20 training modules in booklet form with teaching instructions and accompanying slides on seven themes:
 - Maternal/Child Health
 - Reproductive Risk
 - Contraception
 - The Health Professional and Sex Education
 - Interpersonal Communication and Education
 - Family Planning Program Administration
- Booklet on the demographic history of Mexico's population
- Glossary of population terminology

The development of these materials is being handled by the Education Division of the Family Planning Services Headquarters of IMSS. Eleven IMSS staff members, including several members of the Education Division, are the authors of the modules.

The second stage of the project begins once these materials are published; AMIDEM will train IMSS trainers to use the modules. The materials are expected

to make an important contribution to the family planning communication field. Thus, in the third stage the materials will be offered to other agencies in this region--and possibly in other regions--to be replicated or adapted.

Highlights of In-Country Work

From March 31 to April 11, 1986, Ann Jimerson worked with the Education Division on the training modules, including slide sets. The majority of Ms. Jimerson's time was spent working with and training the Education Division Team. This visit coincided with the overlap of two outgoing and two incoming team members. The two experienced staff members, Beatriz Mansur Macias and Leonor Saíz Fernández, are leaving the division. The new staff, who recently transferred into the division, Celina Degollado Satow and Maricela Ruelas Rueda, will now be responsible for developing and pretesting the materials. Ms. Jimerson worked with the team to carry out the following activities:

- Revise the structure for the modules' text to present as a model to authors;
- Conduct two focus groups with IMSS personnel to pretest the proposed structure;
- Develop written guidelines on text and slides to assist authors in revising their modules;
- Meet with the nine authors to discuss the proposed structure;
- Create visuals for the module on human sexual response, including brainstorming to come up with creative ideas, simplifying charts, selecting diagrams from books, preparing instructions for the artist and the photographer, and taking appropriate photos of Mexicans;
- Select an instructor to present the topic to a group of ten IMSS trainees;
- Develop instruments for four different measurements to apply in the pretest session;
- Conduct a trial pretest session, applying all four measures; and
- Draw up list of steps to complete, develop, pretest and revise each of the modules.

Results and implications of these activities were discussed with Dr. Anameli Monroy de Velasco, Chief of the Education Division, and with Dr. Jorge Martínez Manautou, Chief of Family Planning Services.

A Revised Structure for Modules

Prior to Ms. Jimerson's visit, the education team had made considerable progress in creating a format for each module. The new structure is intended to make the modules easier for instructors to follow by providing objectives and activities for each training session. Each module will be divided into the following sections:

1. Introduction--Places the topic of the modules into the broader context of the Family Planning Themes training series.
2. Goal--Expresses in broad terms the goal of the particular module in terms of applying the information on the job.
3. Instructions for Using this Module--Spells out how the instructor can use each of the sections of the module to prepare for and conduct the training session.
4. Session Outline--In table form, provides general and specific objectives for the topic and a suggested schedule of activities and a timetable for the hour-long session.
5. Conducting the Session--Contains guidance tips for the instructor, suggested timing for each segment of the session, the text for presenting the topic and a black-and-white reproduction of each of the accompanying slides. A list of key points for the topic is provided to facilitate a summary.
6. Practical Suggestions--Provides the instructor with a checklist to assure that classroom equipment and materials are ready and properly used.
7. Didactic Materials--Consists of the pages of slides which will be used to teach the topic, an evaluation form to test trainees on the topic before and after the session, and a form for evaluating the instructor.
8. Didactic Techniques--Lists training techniques to help the instructor conduct an effective session.
9. Messages to Keep in Mind--Lists four messages basic to the provision of family planning services within IMSS and suggests that these be prepared as posters and placed around the classroom.
10. Glossary--Defines terms used in teaching the topic.
11. Bibliography.

This structure helps to turn the text into an easily applied training tool for the instructor. The most serious weakness of the sample module which the education team had developed as a model was the lack of a clear relationship between the specific objectives, the text and the questions on the evaluation form which are to be used to test trainees before and after each training session. This relationship was made clearer for this particular module. The importance of spelling out measurable objectives which are covered in the training session and measured prior to and after the session was pointed out to the authors. Nevertheless, it became evident during the trial pretest of this module that this link and the use of training objectives must be made clear to both instructor and trainees.

The two focus group discussions with IMSS personnel who will be conducting the training confirmed that the structure, the amount of information, the format and the language used in the model are acceptable and practical for the instructors. Many authors had expressed doubts about the need for such detailed guidance for trainers. In a meeting with the authors, the education team pointed out that the doctors, nurses and social workers who were consulted in the focus groups had agreed that the proposed structure would be a useful tool for preparing a training session. Dr. Martínez Manautou supported the team on this point, and the authors agreed to comply with the model format in revising their topics. The education team provided the authors with written guidelines for adapting their drafts to the new structure. A trial training session pointed up several areas which need specific mention or additional attention in the modules. Adaptations will be made as further pretests are conducted, but the basic structure is set.

New Approach for Visuals

Several of the authors had already submitted ideas for slides which they currently use to teach their topics. These visuals consisted almost entirely of text or very complicated graphs and charts. During the meeting with the authors, most of them protested changing the slides for simpler, more visually appealing images. The authors finally elucidated the reason for this resistance. All of them, as instructors, were accustomed to using slides to remind them of the points they wanted to cover in their lecture. Their slides were simply a

written outline of the course. They clearly felt that this was the most useful application of slides for the instructor and believed that the visual representation of text reinforced the lessons for the trainees. The education team argued that the slides are intended for the trainees, not the instructors, and that simplified textual slides and evocative images should be effectively combined to enhance, not simply repeat, the text of the lecture.

The differing needs of the instructor and the trainees became clear during the trial session with the module on human sexual response. The instructor for this session was accustomed to presenting the topic using purely textual slides. During her talk, she jumped ahead of the slide sequence. In her interview after the session, she complained that she saw very little relationship between the slides and the text. She said she much preferred using her own slides which clearly spelled out for her the points she needed to cover. The trainees, on the other hand, when asked which visual images most attracted their attention, mentioned several photographs of Mexicans taken specifically to illustrate the topic. In discussing what they had learned during the session, several mentioned applications of the topic to their work--a point which had been touched on much more strongly through the slides than through the lecture.

The education team remains convinced of the need to use more creative visuals for the modules. They hope that by presenting the authors with alternative visual presentations which maintain a "scientific" look and combine or alternate text with visual images, they can persuade them to develop more attractive and memorable slides. Resistance is strong, however, and the team will need to discuss the visuals with each author, compromising on certain points to satisfy the instructors' desires for more "didactic" materials. Pretests of the various modules should lead to an appropriate balance of textual and visual slides which will assist the instructor in organizing the lecture and will reinforce the main points for the trainees.

Pretest Methodologies

The education team was most interested in developing methodologies for pretesting the modules. The methodologies must be both practical from the standpoint of time restrictions and valid in terms of the sample size. The

modules, text and slides must be pretested with instructors to measure their attractiveness and usefulness in preparing the training session. They will be pretested with groups of trainees for attractiveness and effectiveness in reaching the stated objectives for each topic. In addition, a few individual visuals will be pretested for clarity and attractiveness.

After discussing a number of alternative techniques, the education team decided to test the module through actual training sessions. Each topic will be pretested in two different training sessions with two different instructors. For each session, the team will apply the following four measures:

- Observation--Using a guide developed for this purpose, the education team will observe the training session, checking the time used for each activity, the facility with which the instructor manages the session, how closely he or she follows the text, and the interest and participation of the trainees.
- Pre- and Post-Evaluation--As part of the session, the trainees will complete the same short multiple-choice quiz before and after the slide presentation. Such a quiz is a part of each module and is intended to measure knowledge changes in each of the specific objective areas for the topic. The results of the pre- and post-evaluations will be one measure of the effectiveness of the training session. Its application during pretest sessions will point up, as well, any weaknesses in the evaluation form itself.
- Focus Group Discussion with Trainees--Participants in the pretest training session will be asked to discuss their responses to the structure of the session, the contents and the visuals, and to recommend changes in the training session.
- Interview with Instructor--While the focus group is underway, one of the team members will take the session's instructor to another room to conduct an in-depth interview. A discussion guide for the interview allows the instructor to give opinions on the usefulness of the module in preparing a training session and to recommend revisions in the module's instructions, text and slides.

The education team will summarize, in a brief report, the main findings of each of these evaluation measures from the two trial sessions, recommending

specific revisions. This report will serve as a basis for discussing the module with the author, who will then make the recommended revisions.

Work Plan for All Modules

Managing the development, pretests and revisions of all 20 modules, working with nine different authors and conducting and reporting on 40 pretest sessions, will be a monumental task for the education team. To help organize the tasks and to track progress on the 20 different topics, the team developed a form which lists all steps and persons responsible. This chart will be mounted on the office wall and used to check the status of each of the modules.

Implications for Training of Trainers

Discussions with the authors and the pretest instructor, and observation of the pretest session indicate that several factors need to be addressed in training the trainers who will use the modules. The trainees should:

- Use the sections of the modules to reinforce training methodologies. The modules will contain training guidelines for the instructor. The training of trainers should familiarize the instructors with each of these sections to help them organize their training.
- Emphasize objectives-based approach to training. The tested and revised modules will indicate quite clearly the specific objectives for each topic. Instructors should be taught to look for relationships between those objectives and the main points of the slide presentation. Trainers should be encouraged to use the pre- and post-evaluation quiz which is part of each module to measure their own effectiveness in presenting the topic, and should teach with an aim to meeting the objectives. The one trial session conducted during this visit indicated that the instructor did not make an obvious connection between objectives and lesson and did not clarify the main points. (The trainees actually scored worse on the post-evaluation than the pre-evaluation, in part due to weaknesses in the quiz and in part to the instructor's failure to teach to the objectives.)
- Practice using the slides to reinforce the lesson. As indicated above, IMSS instructors are accustomed to using slides which contain text and

complex graphs or tables to help them (the instructors) through the lecture. The slides developed for the modules will include a mix of text and more evocative visuals to reinforce the main points visually for the trainees. Without the clues they are accustomed to, the trainers are likely to feel lost and frustrated. Training of the trainers should help them to understand the advantages for the trainees of more attractive and simplified visuals. They should also be given the opportunity to prepare a presentation with such slides, an undertaking which requires a good deal of preparation on the part of the instructor.

- Provide examples of effective training techniques. Watching the module being used in a training session is very different from simply sitting down to read through the module. One device for training at least the top round of trainers might be to show a videotaped session in which a well-prepared instructor follows one of the course module's instructions to conduct all activities. Trainers could then be led through a discussion of how the instructor used the module, giving special attention to training by objectives, creative use of the slides and good interaction with the trainees.

UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT (USAID)

Ann Jimerson visited the USAID mission to discuss the project's progress and the activities of the visit with Sam Taylor, USAID Representative, and Magdalena Cantu, Assistant.

CONCLUSIONS AND RECOMMENDATIONS

The development of the 20 modules is well underway, with a useful format for the authors to follow and a well-trained education team.

Based on observation and work completed during this project support visit, it is recommended that:

1. The education team work closely with the authors to assure that the modules follow the structure and format developed;
2. Emphasis be given to creating simple and visually-attractive slides;
3. Each module be pretested through two training sessions, using the four measures developed during this visit;
4. Each module be revised carefully, taking into consideration the various pretest results;
5. As the strategy for training of trainers is developed, the recommendations in this report be taken into consideration; and
6. JHU/PCS provide further training and support to the project, especially at the point where most of the modules have been pretested and the team is ready to revise modules based on pretest results. Support for such training is all the more important since the team is losing two members and their replacements lack experience in materials development.

If these recommended steps are followed, JHU/PCS can expect an excellent set of training materials which will be useful not only in Mexico but throughout the region.

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