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CAFS MIDDLE-MANAGEMENT CURRICULUM REVISION WORKSHOP

APRIL 5 - 23, 1993

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FAMILY PLANNING MANAGEMENT DEVELOPMENT

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1

CONTENTS

Executive Summary 1

I. The Process 1

II. Current Status 2

III. Future Work 3

IV. Findings and Recommendations 3

ANNEXES

Annex 1: The Curriculum-Writing Team
Annex 2: Steps of the Curriculum-Development Process
Annex 3: Daily Workshop Process Reports
Annex 4: Modules, Goals, and Topics
Annex 5: Memo to the CAFS Director

Executive Summary

The goal for the curriculum revision workshop was to "write up in a systematic manner, training materials that would be used by the trainers and trainees on the CAFS Middle Level Management Course." The objectives were:

a. To review the existing course content and objectives.

b. To group the reviewed content into modules.

c. To work out and agree on a structure for module writing.

d, To write up the modules with respect to trainers' manual and trainees' manual, following the agreed module structure.

e. To assemble materials that would later be organized into a book of readings to accompany the two manuals.

The curriculum revision team completed all five objectives, operating methodically, enthusiastically, efficiently, and with good humor, in view of the complexity of the materials and the varied background and points of view of the team members. In fact, the diversity of the team, which might have caused some frustration in trying to reach consensus, proved an advantage, bringing unexpectedly broad dimensions to our re-shaping of the course.

This report briefly reviews the process we have used, details the current status of each of the three products - Trainers' Manual, Trainees' Manual, and Book of Readings, and proposes a scheme for following up on this workshop and bringing its products to the level needed for field testing in September.

I. The Process

The members of the team are identified in Annex 1. We cannot praise highly enough the determination, intelligence, and commitment they sustained throughout the workshop. The core team carried the ball, while the part-time consultants completed their writing assignments in the face of competing work pressures, conscientiously shaping their work to the guidelines that had been developed by the full-time team members.

It became clear very early in the workshop that the task was not just to develop manuals, but to look closely and critically at the concepts, methodologies, content, and logical flow of a course that has been given many times. The development process has been systematic and logical, with few detours. It has sometimes been frustrating and always lively as we wrestled with ambiguous ideas, muddy definitions, multiple approaches, and sophisticated management concepts. The most common words used in training and management turned out to have different meanings for different people, and we had to reach consensus in order to bring a reasonable level of precision and standardization to our work. Nothing was taken

for granted: we rethought every moment of the course and tried to bring a fresh new twist to even the most successful activities. We ranged back and forth, revising our guidelines whenever members had new insights. The process was documented daily by different members of the team, producing a running commentary which we used to track our progress. The steps of the process are found in Annex 2 and the daily process reports in Annex 3.

The task was greater than anticipated, and the team rose to the challenge with late nights, early mornings, freely-offered and gratefully-accepted advice, and a remarkable spirit of camaraderie and mutual commitment. The final week produced an intense flurry of writing as the deadline neared, and special commendation must be given to Mrs Jane Rose Ochola without whose diligent, competent, and tireless efforts the drafts would never have seen the light of day.

In our final wrap-up discussion, there was unanimous agreement that the process worked well, that the first week of sorting out and thrashing out divergent views made everyone's thinking and writing immeasurably clearer and more efficient, and that we have undergone a rigorous intellectual exercise. There was also universal regret that the pressure of writing made it impossible to carry out the review and light editing we had hoped for. We tried to compensate with frequent informal consultation and one review session where we looked in a disciplined way at selected aspects of work in progress. There was also universal agreement that we could have benefitted greatly from the chance to try out with each other new training approaches and techniques.

II. Current Status

This report is accompanied by drafts of the two manuals, addressing all 13 modules and the subsidiary topics for each. Both manuals are loose-leaf binders, allowing trainers and trainees to add material and CAFS to revise the content as time goes by. The manuals contain goals, learning objectives, content areas, activities, and key concepts for each topic, presented differently for the trainers and trainees, according to their differing responsibilities and needs during the course. The Trainers' Manual spells out the key concepts that guide each activity, with instructions for carrying out the activities detailed enough to guide a novice trainer but leaving room for the more experienced trainer to use his/her experience and creativity to adapt and enrich the learning experience. The Trainees' Manual contains basic instructions and content summaries; it will grow as the course proceeds and participants fill it with handouts, exercises, and notes of their own.

Supplementary material is included for each topic -- transparencies, handouts, written exercises -- at varying levels of completion. There are many preliminary suggestions of accompanying readings, but the bulk of readings cannot be selected until we have access to a variety of legally-reproducible materials from which to choose the most cogent and readable.

III. Future Work

Despite the prodigious efforts and considerable talent of the team, it has been clear from the beginning that it is not possible to completely redesign a 6-week course and come up with finished curriculum materials in three weeks. The following work will have to be completed after the workshop to produce the high-quality, lasting materials this course deserves:

a. Final editing for consistency of style and content within and between manuals.

b. Careful selection of current readings, relevant to the learning and working needs of the participants, and their incorporation into the Book of Readings.

c. Development of up-front material for the Trainers' Manual, to include guidelines and checklists for planning, conducting, and evaluating the course; proposed schedules; sample forms; brief descriptions of training approaches and techniques; post-workshop requirements, etc. Some of these materials will be modified for inclusion in the Trainees' Manual as well.

d. Revision of evaluation instruments to conform to the new course content and emphases.

e. Revision of the Keutaga case study which is the essential tool used to lead participants through the elements of the planning process.

f. Final production of the three manuals.

IV. Findings and Recommendations

1. *Finding*: The revision of this curriculum depended greatly on the contributions of Mr Kalaule and Dr Aelakun who had developed the course and taught it many times. Their accumulated experience gave us the essential framework within which we operated.

   Recommendation: The revision of other CAFS courses in the future should be undertaken only after the original course has been given at least twice. The team should include at least one trainer who has conducted the course.

2. *Finding:* This workshop made possible the first, and most difficult, phase of a complex effort. There are several remaining tasks that must be completed if this course is to reach the level of professionalism CAFS is seeking. The attached memo to Professor Okoth-Ogendo (Annex 4) spells out the tasks to be done and the resources needed to complete them.

Recommendation: The requested personnel and time in Boston should be approved and supported by funding agencies.

3. *Finding*: It has been possible to construct this course in modules, despite the importance of the thread of project planning that runs through it. Many of these modules could be expanded, adapted, and tailored to meet requests for in-country training. However, our experience indicates that the adaptation will not be simple; even where we have adapted topics designed for the predecessor of this course, we have had to analyze the purpose and content, reshape the activities, and draw on new supporting materials.

   Recommendation: CAFS should expand one module for a specific purpose to get a sense of what it will cost in terms of money and personnel. This experience should guide other future module development.

4. *Finding*: The core team developed a cohesive style of working that drew on all our strengths and maximized our productivity. The part-time consultants struggled to fulfill their obligations in the face of other demands away from the workshop site, and found it very frustrating to drop in and out of the smooth operations of the team.

   Recommendation: In the future, CAFS should make every effort to release all those working on a curriculum for at least the first segment of planning time. They can then take part in establishing the framework and do their independent writing with greater confidence and understanding.

5. *Finding*: The KCB facility was an excellent choice for the venue of this workshop. It was reasonably priced, quiet, comfortable, and conducive to both independent and group work. The staff was unfailingly accommodating.

   Recommendation: CAFS should continue the practice of curriculum development in a setting removed from day-to-day office pressures. It should strongly consider KCB for other activities of this kind.

6. *Finding*: The availability of Ms Buxbaum's computer greatly facilitated the decision-making during the first part of the workshop. She was able to produce summaries and working documents quickly and incorporate the comments of the rest of the team as decisions were made. She was also able to produce her own drafts of modules without the arduous work of handwriting, transcribing, and re-writing by hand. The rest of the team was constantly made aware of the advantages of wordprocessing skills for technical people.

   Recommendation: Every effort should be made to bring CAFS technical staff to a level of computer literacy where they can enhance their expertise by this simple mechanical skill.

ANNEX 1

THE CURRICULUM-WRITING TEAM

Full-time

Mr Ezekiel B. Kalaule, CAFS: Workshop Coordinator
Mr Duncan O. Ochoro, University of Nairobi: Resource Person
Mrs Joyce Musandu, School of Advanced Nursing, University of Nairobi: Resource Person
Dr Ade Adelakun, SEATS, Harare Regional Office: Resource Person
Ms Ann Buxbaum, FPMD, MSH, Boston: Consultant
Mrs Jane Rose Ochola, CAFS: Workshop Secretary

Part-time

Mr Kandara Muteto, CAFS: Resource Person for Financial Management
Mrs Jane Kwawu, CAFS: Resource Person for Women in Health
Mr Stephen Ndegwa, Kenyatta National Hospital: Resource Person for Supplies Management

ANNEX 2

STEPS OF THE CURRICULUM-DEVELOPMENT PROCESS

1. Pre-workshop planning by Mr Kalaule, Mr Adelakun, and Ms Buxbaum.

2. Opening, with clarification of USAID's and CAFS' expectations for the curriculum and for this workshop.

3. Individual and group review of the considerable background information prepared by Mr Kalaule and used repeatedly throughout the workshop.

4. Definition of the special characteristics of this course which are to be preserved and enhanced through these revisions, and of what has worked well and less well in previous versions of the course.

5. Definition of the course goal and potential audience.

6. Agreement on the purposes, audiences, and content of the three proposed products (Trainers' and Trainees' Manuals and Book of Readings).

7, A plan for addressing certain topics of overriding concern to CAFS and the family planning community (e.g., women in health) and skills requested by previous course participants (e.g., office management, running meetings).

8. Brief review of training methodologies and techniques, with distribution of materials to be used as guidelines for reviewing and revising course activities.

9. Attempt to reach consensus on the definitions of terms often used ambiguously in preparing training curricula (e.g., module, topic, session, lesson, sub-topic, content, learning element, learning activity, etc.)

10. Review of training manuals from several sources, to help us agree on the structure and format for the proposed manuals: module, goal, topic, learning objectives, content/key concepts, materials and supplies, background readings, and activities, with approximate times allocated to each component.

11. Identification of 13 modules with their goals and topics to be covered; determination of time allotted to each module and topic; and assignment of writers/writing teams for each topic.

12. Distribution of relevant reference material to each writer and agreement on deadlines and a review process.

13. Individual and paired writing, according to the preference of each team member, with frequent informal consultation to clarify issues as the writers encountered them.

14. Three review sessions: one at the end of the first week to share our responses to the process to date; one at the end of the second week to determine the status of the writing and set deadlines for the final week; and one at the end of the workshop to wrap up the experience.

ANNEX 3

DAILY WORKSHOP PROCESS REPORTS

FIRST PROCESS REPORT

Ann Buxbaum

PREPARATION

1. EK prepared folder for each consultant containing information about the workshop, a tentative schedule for first 3 days, background information, and samples of materials used in middle level mgt course.

2. EK, AA, and AB met to review workshop objectives and schedule. EK and AA briefed AB on history of course and their experience with it over time. Began to discuss definitions for curriculum revision (module, topic, session, etc,). Defined initial roles for first 2 days of workshop.

DAY 1: 5-4-93

1. Opening (see agenda), introductions, identification of working group (see list). Points that emerged:
   - Workshop will produce drafts of Trainers' and Trainees' Manuals and skeleton for Book of Readings, to be tested during next course
   - Curriculum will need periodic revision to stay current and relevant
   - CAFS needs stand-alone modules to be marketed for in-country training, but this course cannot be segmented without destroying its design: a process, sequential, with interdependence among the topics. Modul to be developed later?

2. Logistics for workshop, course description, evaluation methods and tools

3. Special aspects of course:

   - Films woven into discussion of some topics
   - Writing of project plans as both training method and output
   - Case study and exercises threaded through course to learn and practise skills before applying them to project plans
   - Two levels of certificate, reflecting degree of participants' involvement and achievements
   - Field visit with mgt audit

4. What has worked well?

   - Course as integrated process, sequential thinking
   - Project plan as microcosm for mgt process, internalised learning
   - Films
   - Field mgt audit and report
   - Emphasis on group dynamics with trainers as resources
   - Sharing problems, group problem-solving
   - Rigor of pre- and post-tests and distinction between 2 types of certification
   - Feedback system (return of pre-test with scores partway thru course; open, honest evaluation of trainers, analysed by participant committee).
   - Mix of participants, from senior managers to supervisors with mgt responsibility in field (also can be a disadvantage -- see below)
   - Pool of resource people available to train in specific technical areas

4. What hasn't worked well?

- Lack of clear identification of some important supplementary skills (e.g., critical thinking, conflict resolution)
- Possibility of too many topics, need to identify "core" subjects and look at quality of training on each one
- Lack of follow-up strategy (USAID now supporting it, some F-U activities have begun)
- Mix of participants, requiring trainers to reach out to several levels of experience and capacity (linked to financial pressures, requiring acceptance of virtually all sponsored participants into course, and donors' prerogative to select participants)
- Lack of conceptual framework: what are key mgt issues that require an intervention? What are key FP/health issues?
- Course emphasis on benefits to individual participants, with less attention to their transmitting their new skills to peers and subordinates; thus, limited influence on organizational change.
- Too little time for budgeting as integral part of planning process
- Lack of computer component for MIS and financial mgt
- Lack of time for participants to adapt/develop useful tools (e.g., supervisory checklists, job description formats, etc,)
- Lack of time for self-development skills (communication, presentation, negotiation, conflict resolution, women's assertiveness, etc.)
- Methodology quite structured, lack of varied participatory training experiences
- Course packed: lack of time to relax, absorb, think
- Course title vague and unnecessarily restrictive

5. General Issues that Emerged from #4

- Problems of FP/health mgt in Africa: political appointees who may have good technical skills but with few mgt skills are heads of programs; thus weak coordination and control
- Difficulty of balancing universal mgt issues with regional/country differences and unique problems
- Need to think ahead to how marketable course will be in 5 years: module development?
- Need to retain course emphasis on general program planning and management, with less focus on mgt functions
- Conflicting goals in course design/revision: need to maintain integrated sequential process vs CAFS needs for independent modules

6. Review of History, Purposes, Justification of Course

7. Definition of Course Goal

To create a pool of trained managers equipped with knowledge, skills, and attitudes to efficiently and effectively meet the changing needs of family planning programs in sub-Saharan Africa.

8. Discussion of Conceptual Framework

Although some members had suggested that the course lacked a conceptual framework, on further discussion, the team decided not to pursue this; it was felt that the broad context of the course was clear and that trying to design a theoretical construct would be a diversion from the considerable amount of work ahead.

WORKSHOP FOR MATERIALS PRODUCTION
MIDDLE LEVEL MANAGEMENT OF FP PROGRAMMES COURSE

SUMMARY REPORT OF ACTIVITIES (J. MUSANDU)

DAY 2 6.4.93

A photocopy of a summary of the previous day's activities was presented.

Ann presented the day's plan to include the following:

I. MANUALS

Why? For whom?

What?

How?

- Trainers)
- Trainees) What are the relationships!
- Book of Readings)

II. MODULES/TOPICS/SESSIONS
CORE SUBJECTS
- Definitions

Discussions centred on the above outline and number of issues were raised, discussed and decisions made.

1. WHY A MANUAL?

This was looked at and during brainstorming the following list was developed:

(a) Trainers Manual

- For quality and standardization of training
- Provide uniformity of content
- Guide for evaluation
- Institutionalisation
- Provide continuation of content in country
  Facilitate marketing of courses and fundraising with donors (Note display not only distribution)
- As a tool for follow-up
- Provides quick answers where there is competition for the most professional product
  Assist institution in planning and evaluation of their programmes

- Potential for fundraising e.g. selling to participants or included in course fees
- Ease job of trainers, save time
- Provide basis for orientation of new staff and resource people (in-country and outside)
- Provide reference/content for TOT

Caution for Users: Avoid inbreeding rigidity, lack of creativity and inflexibility.

*Applies to Reading Books as well
**Applies to Trainers Manual & Reading Book

(b) *- Facilitate self learning (learners can read ahead try exercises and share ideas

*- For reference during the course and for action while at work

*- Enables the learners to pace their own learning based on their level and speed (self-pacing)

*- Removes mystery and reduces distance between trainers and trainees

*- Saves time (Time for note-taking and library search) more time is thus spent in discussion of meanings of concepts and their applications

*- Provides environment for shared responsibility for learning by increasing active participation in learning

- Aids in self evaluation because objectives are available and learners can seek remedial help when needed

*- Helps learners to determine the scope and work load

- Is adaptable for in-country training

*- Facilitates dissemination of information within organisations (trainers use Manual to discuss or critique issues - multiplier effect)

**- Aid in putting together project plans

- Is handy in emergency situations when for some reason the regular trainer fails to arrive - anybody can pick the Manual and teach or try to make sense out of it.

2. A MANUAL FOR WHOM

(a) Trainers:
- o CAFS Trainers and Resource People working with CAFS Staff
- o Resource People working on their own when a situation arises
- o For evaluators, supervisors or trainers who follow up those who have been trained to observe results
- o For those who have not attended the course but would like to keep themselves up-to-date

(b) Trainees: Managers of Family Planning programmes. Classroom teaching and also application on the job - operationalisation of skills and for reference later

3. WHAT GOES INTO A MANUAL

Following a lot of brainstorming and discussion, a list of things was produced. It included the following:

(a) Prelims

- Cover page
- Title page
- Copyright page
- Table of Contents
- List of Authors - Acknowledgement
- Preface/Forward/Introduction
  - o to contain information about the organisaton (CAFS)
  - o history of the course
  - o information on the Manual/Course (why, what, for whom and how to use)
  - o goals/objectives

- description of participants
- description/definitions of modules, sessions etc.

- List of abbreviations and acronyms
- Course schedule
- Pre-course preparation guidelines, visits, sample forms (? separate package)
- List of documents for trainees to bring to the Workshop
- Format for report writing
- Post course activities guidelines

(b) Main Body of the Manual to contain:
- Topics
- Sub-topics
- Core course
- Session plans/lesson plans
- Teaching notes (handouts, case studies etc.)
- Reading Materials and other teaching/learning materials
- Teaching Methods
- Evaluation Methods

(c) End Part
Bibliography
Index

4. HOW presented
- Format of presentation
- Structure of the Manual
- Structure of the modules/sessions etc.
- Organization and sequencing of materials

III. DEFINITIONS

Define specific courses to be covered which address CAFS objectives (mission)

On the question of core and or subsidiary core courses was discussed and it was agreed that these can be determined at two levels:

I. Determined by CAFS e.g. the Women and Health Gender Issues, STDs and AIDS etc. there is need for a specific policy guideline as to how much should be included:
- the list to be determined by the management
- CAFS to develop mini modules on specialized areas
- examine implications on course structure length and cost

The women and gender issues were not discussed exhaustitively as further input was required from Jane who was not present.

It was also noted that in absence of clear guidelines it may be easier to consider including some of the issues for discussion during the training programmes with a view to creating awareness at least - but aim at eventually commissioning specialists to address them fully e.g. develop mini modules.

II. Some of the inclusions may also be determined by management needs found in the field - to bridge the gaps between training and service needs.

AFTERNOON SESSION

Part of the afternoon session was spent in trying to articulate some of the meanings of terminologies.

A lot of time was spent in searching for a definition of a module as it had been agreed that the topics should be grouped into specific modules for ease of presentation.

The most workable definition of a module arrived at was:

(A package of inter-related topics to be treated to achieve a defined learning goal.

Some of the characteristics of a module which were identified included:

- has a collection of related topics
- complete package of learning issues related to specific topic
- collection of related topics that can stand alone (CAFS)
- has own specific objectives - complete. Can be evaluated but can be modified and linked to other modules
- size depends on the needs - can be expanded if need be.

The later part of the afternoon was spent on trying to define the structure of the module in terms of topics, sub-topics, learning elements, sessions and learning activities.

Conceptual presentation of the structure of a course based on Modular System:

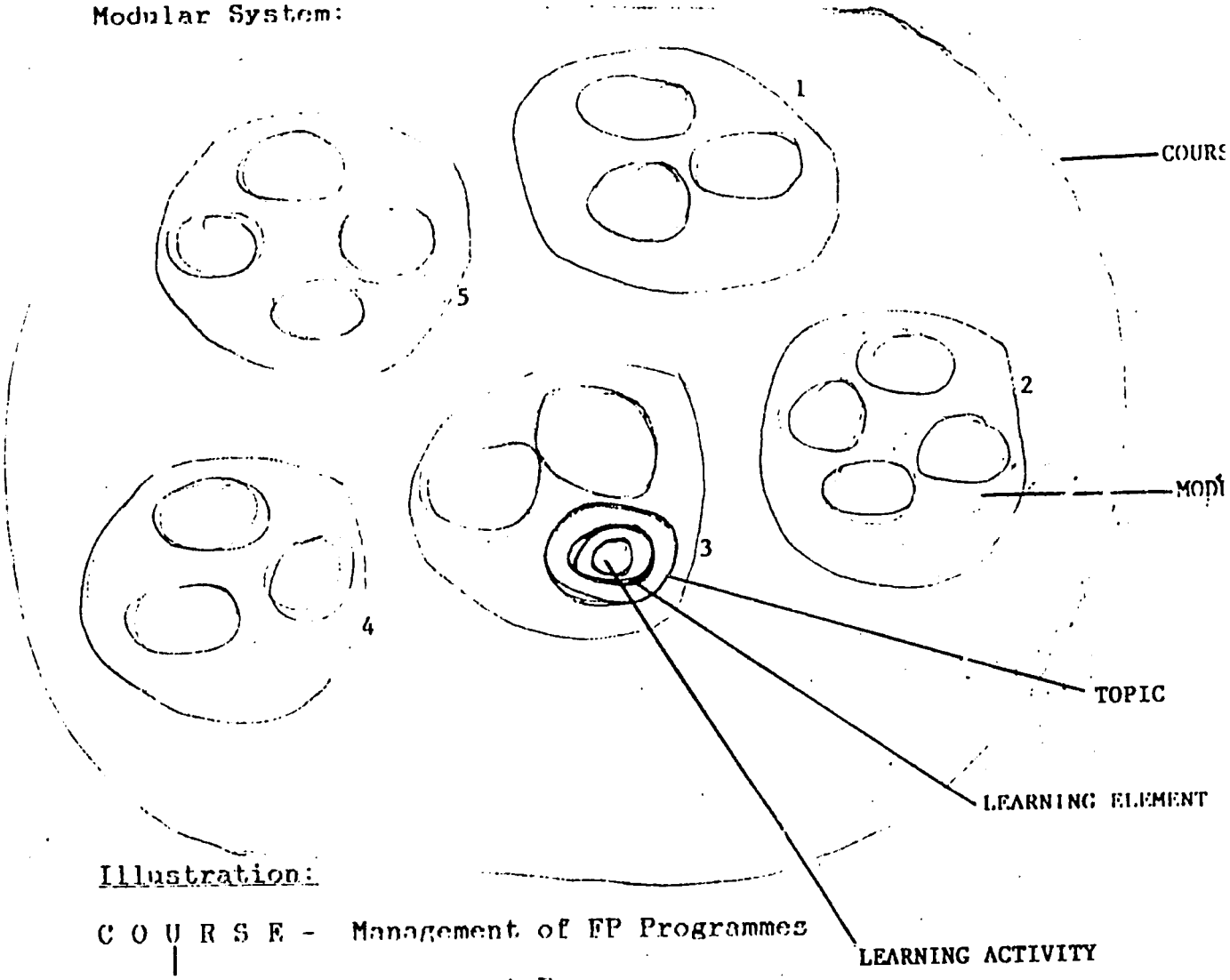

Illustration:

C O U R S E - Management of FP Programmes

Module - Management Process

Topic - Planning

Learning elements -Data Collection
-Presentation of Data
-Data Analysis

Learning activity -Case analysis
-Library search
-Discussion etc.

17

Learning activity was defined as an interactive activity that contributes to the achievement of stated learning objectives.

The last activity for the afternoon was the review of the grouping of topics into possible modules. This was done using a working paper which had been prepared based on the topical outline. Up to 5 areas were identified:

Module I
INTRODUCTORY ACTIVITIES

Module II
GROUP DYNAMICS

Module III
FAMILY PLANNING/REPRODUCTIVE HEALTH ENVIRONMENT IN SUB-SAHARAN AFRICA

Module IV
MANAGEMENT PROCESS

Module V
DEVELOPING A FP PROJECT USING A KEUTAGA CASE AS AN ILLUSTRATION

This exercise to continue on 7.4.93 until all the topics have been placed in some form of module in a logical sequence.

It was emphasised that a critical look be made so that all learning issues are identified to conform with the topics.

DAY 3:

SUMMARY REPORT OF ACTIVITIES ON 7.4.93

by: J. MUSANDU

The day started as scheduled at 8.30 a.m. Dr. Ade Adelakun was on the chair.

The Committee reviewed the Workplan prepared the previous day and decided to complete with the identification of the modules to be included in the Manual.

The morning section was therefore spent on discussing the grouping of topics to form modules.

Anne had prepared a working paper which was scrutinised and further discussions took place examing the section by section. At the end of the day, a total of 13 modules were identified:

Module I — Introductory Activities
1. Opening and introductions
2. History and description of CAFS
3. Course orientation
4. Course leadership structure
5. Pretest

***Module II** — Group Dynamics
1. Group process
2. Team building
3. Interpersonal communication

***Module III** — The Family Planning/Reproductive Health Environment in Sub-Saharan Africa
1. Relationship between population, FP, and development
2. Country profiles: presentations, discussion, analysis, and summary
3. Women and health as a function in FP programme management

Module IV — The Management Process
1. Planning
2. Implementation
3. Evaluation

Module V — The Planning Process

1. Theoretical presentation outline
2. Introduction to Keutaga

Module VI — Pre-Planning

1. Data collection and analysis
2. Problem definition and prioritisation

Module VII — Project Formulation

1. Project goal
2. Project objectives
3. Target groups
4. Project strategies
5. Strategic objectives and targets

* = Potential stand-alone modules

Module VIII — Planning for Implementation

1. Activities and resources
2. Organisational chart
3. Coordination plan
4. Logistics plan
5. Scheduling (Gantt chart)
*6. Financial management:
   a. Sources of funds
   b. Budgeting
   c. Expenditures
   d. Financial control

Module IX — Planning for Monitoring and Evaluation

1. Definitions and explanations of monitoring and evaluation
2. Indicators
3. Sources of information:
   a. MIS
   b. Supervision:
      i. Supervisory plans
      ii. Supervision tools (e.g. job descriptions, checklists, schedules, workplans, journals, etc.)

*Module X — Human Resource Management: Selected Issues

1. Overview of current management issues, concepts and practices
2. Supervisory approaches and styles
3. Motivation
4. Leadership theories and styles
5. Training as a function of management
6. Performance planning and appraisal

Module XI — Field Trip and Processing

Module XII — Individual/Country Projects

1. Writing the project proposal
*2. Presentation (summarising, preparing graphics, use of presentation tools such as overheads, flip charts, handouts)
3. Presentation of project summaries, with feedback on content and presentation style

Module XIII — Winding up Activities

The afternoon session was spent discussing and laying out the module structures and the following was agreed:

STRUCTURE OF A MODULE : TRAINERS MANUAL
(Top Page)

TITLE OF THE MANUAL

GOAL

TOTAL TIME

TOPICS TIME

MODUE NO..... TITLE.....

TOPIC I: ACTIVITIES AND RESOURSES

TIME: HRS.....

OBJECTIVES:

On completion of this topic, the learners will be able to:

1.
2.
3.
4.

Content/Key Concepts

1.
2.
3.
4.
5.

Materials & Supplies

Background reading

Participant assignment

MODULE STRUCTURE TRAINEES

MODULE 5

TITLE

GOAL

TOTAL TIME

TOPICS APPROX. TIME
1. HRS. FRACTION MINUTES
2.
3.
4.

OBJECTIVES:

on completion of this topic, participants will be able to:
1.
2.
3.
4.
5.

Content/Key concepts
1.
2.
3.
4.

Reading Materials
Compulsory reading
Supplementary reading

Activities

At the end of the day the participants discussed a workplan for the next day 8.4.93 and a priority list was drawn up as follows:

1. Review Training Methods
2. Example of Module/Topic plan to be done collectively
3. Develop goals for Modules (Anne)

Possibly assign tasks.

The issue of Easter weekend was discussed and it was agreed that participants should take a break from Thursday evening to Sunday evening and start work again on Monday 12.4.93 at 8.30 a.m. and work throughout that week up to Sunday to make up for the Easter days.

The session closed at 6.45 p.m.

DAY 4:

WORKSHOP PROCESS 8.4.93

by: D. Ochoro

ACTIVITY 1 - Developed Module Structure for the Trainees Manual

ACTIVITY 2 - Developed the Topics Structure for the Trainees Manual

* Agreed that the manual will be single-line spacing; but with adequate spaces between topics in the format.

* Discussed in detail the need and content of material for the "Learning Experience/Activities" in the Trainees Manual and agreed to include it in the format.

Activity 3 - We all made comments (reviews) of the workshop process so far as a form of interim evaluation of the progress. The observations were quite positive and encouraging including:

i. The group members have gotten to the level of understanding each other pretty well for the purpose of the workshop.

ii. The group has spent time discussing understanding and agreeing on the critical components of the assignment - objectives of the exercise, components, terminologies, formats etc.

iii. The pace has been quite satisfactory given that once the base has been set, then the rest of the exercise should be pretty straight forward.

iv. That CAFS had done a lot of background work in preparing materials for the workshop which have been and will be very useful to the resource persons in the workshop - reference books of reading, draft trainers and trainees manuals, transparency notes and other electronic gadgets.

v. The need and possibility of pairing resource persons when it comes to writing the modules/manuals to create an enabling environment for exchanging ideas and

experiences on what should go into the manuals.

Activity 4 - 1. Ran through documents on Training Methodologies and Techniques as a part of preparation for selecting appropriate methods/techniques for various topics in the manuals.

2. Discussed the effectiveness of using Case Study method in training with suggestions in enriching the Keutaga Case in the course. May be smaller cases could be considered for the additional topics as appropriate.

3. Discussed the possibilities of enriching the course through restructuring the approach and methodology, easing on the time for both the participants and facilitators without necessarily making the course duration any longer. Long courses are expensive, and difficult to market both to participants and the donors.

Activity 5 - Applied a Topic Structure and terminologies in a topic session showing all the parts and the content in every part of the session.

Activity 6 - Studied and discussed the Module Goals which had been developed by Ann for all the 13 modules and recommended changes as appropriate.

DAY 5:

SUMMARY REPORT OF ACTIVITIES 12.4.93

by: S.W. Ndegwa

1. Following draft structures of modules, topics and activities were discussed and necessary amendments made:

   - Sequence of Modules and Topics
   - Topic structure of Trainees Manual
   - Module structure of Human Resource Management - selected issues
   - Topic Structure, Leadership Theories and Styles
   - Activities Structure of Trainers Manual
   - Revised Sequence of Modules and Topics

2. Format & Structure of Activities for Trainees Manual

   This was discussed and various options examined. The contents of what will constitute activities for Trainees Manual was discussed at length and various formats of presenting this were examined. Agreed that activities in the Trainers Manual will be matched with those in the Trainees Manual.

   - Preparation of the manuals to cover three areas:

     - Trainers Manual
     - Trainees Manual
     - Transparencies

   - Numbering of documents, to be used with the manuals, to include the following:

     - Questionnaires (Q)
     - Transparencies (T)
     - Hand-outs (H)

3. Allocation of Estimated Time to Modules & Topics

   Modules and Topics were critically analysed and estimated time allocated; taking into account the restructuring already done on topics and subject content.

   Contents to be covered under each Module and Topic were examined and discussed before estimated time was agreed upon.

Time allocated to each Module and Topic is as indicated on the attached document.

4. <u>Arrangement for Writing Modules & Topics</u>

- Discussed various options of organizing the group for writing the Modules and Topics

- Identified specific topics - Logistics, Women & Health and Financial Management for which the facilitators who have been handling them in the course will write draft manuals

- The remaining Modules and Topics were then shared among three groups - Ann, Ade & Duncan, Zick and Joyce

- Each group to handle Modules and Topics allocated but consultation and sharing of information to be maintained between the groups

- List of Modules and Topics allocated to each group is as indicated on the document with time allocation (see 3 above).

29

Ann Buxbaum

WORKSHOP PROCESS

DAY 6: 10-4-93

The team allocated approximate times to each topic to be covered during the course and assigned each to either an individual or a pair of writers.

DAYS 6 - 13: 10-4-93 - 17-4-93

This period was devoted primarily to writing. Two part-time writers had been unable to participate in the planning sessions or the initial week of writing, but they came to be briefed and receive illustrative materials during the second weekend of the workshop.

People pursued their writing tasks differently; one pair worked together through much of the time, sharing their complementary expertise; others worked individually, calling on other team members for informal advice, ideas, and feedback. Throughout this time, Mrs Jane Rose Ochola, workshop secretary, entered completed drafts on the computer and maintained the workshop files.

DAY 9: 13-4-93

Mr Kalaule and Mrs Buxbaum briefed Angela Franklin Lord at USAID/REDSOE and Professor Okoth-Ogendo at CAFS, giving each a copy of the progress report and discussing the rationale for follow-up time after this workshop to produce finished materials at MSH in Boston.

DAY 10: 14-4-93

The team interrupted the writing routine to spend several hours debating and selecting a format for the description of activities in the Trainees' Manual. The decision hinged on several issues:

- How much information was necessary for trainees to prepare for a topic, and how much preparation was likely
- How to give trainees a summary of training events without "giving away" in advance the learnings that were intended to emerge from activities
- How to prevent trainees from devoting themselves to taking copious notes, but still provide them with a lasting record of key learnings and a synthesis of every topic, to refer to after the course and to share with colleagues.

The team finally reached consensus on a format and a system for distributing important summary material which guided the writing for the Trainees' Manual throughout the rest of the workshop.

DAY 13: 17-4-93

A review session was originally scheduled for Day 11, but when the day came, it was universally agreed to postpone the session and maintain the writing impetus. The review session was held the morning of Day 13, just

before Dr Adelakun's departure from Kenya. The team planned the efficient use of their very limited time by agreeing what to look for in the review and what to omit or reserve for later editors:

Look for: Uniformity of structure; common understanding and consistent wording of main elements (including key concepts, written exercises, transparencies, handouts); presence of processing/synthesizing for each activity; variety of training techniques across the course

Omit: Content (assuming each writer's expertise or access to expert opinion); readings (to be completed after the workshop); grammar, spelling, and writing style (to be edited later).

In this context, the team accomplished the following:

- Carefully reviewed one member's draft of trainer and trainee materials and looked briefly through selected areas of other members' drafts
- Used these drafts as a springboard for clarifying remaining differences of approach
- Slightly revised the allocation of time to modules and topics
- Expanded the list of general explanations and instructions to be provided in the beginning of Trainers' and Trainees' Manuals
- Reviewed the current status of writing assignments
- Agreed on deadlines for each assignment for the final week of the workshop.

ANNEX 4

MODULES, GOALS, AND TOPICS

Module I: **Introductory Activities**
GOAL: To set the stage for the course.

TOPICS:
1. Opening and introductions
2. History and description of CAFS
3. Course orientation
4. Course leadership structure
5. Pretest

Module II: **Group Dynamics**
GOAL: To enable participants to function effectively as group and team members throughout the course and to form, manage, and participate in groups when they return home.

TOPICS:
1. Group Process
2. Team Building
3. Interpersonal Communication

Module III: **The Family Planning/Reproductive Health Environment in Sub-Saharan Africa**
GOAL: To familiarize participants with the demographic, socio-economic, and programmatic context in which family planning programs operate in SSA in relation to their own country and program.

TOPICS:
1. Relationship between Population, FP, and Development
2. Country profiles: Presentations, Discussion, Analysis, and Summary
3. Women and Health

Module IV: The Role of the Manager

GOAL: To offer participants a working model of the management process within which managers should operate and to provide insights into some of the most common issues managers face day to day.

TOPICS:

1. The Management Process
   a. Planning
   b. Implementation
   c. Evaluation

2. Some Common Issues for Managers
   a. Time management
   b. Office management
   c. Running meetings
   d. Delegation
   e. Decision-making
   f. Particular relevance of a-e to women managers and workers

Module V: The Project Planning Process

GOAL: To give participants the theoretical background and tools they will draw upon to develop family planning project proposals for their own countries and programs.

TOPICS:

1. Theoretical Presentation, Outline
2. Introduction to Keutaga

Module VI: Project Pre-Planning

GOAL: To enable participants to use actual demographic, health, and socio-economic data for identifying and prioritizing problems during the course and when they return to their jobs.

TOPICS:

1. Data Collection and Analysis
2. Problem Definition and Prioritization

Module VII: Project Formulation

GOAL: To provide participants with the skills needed to plan their country projects during the course and future projects or programs when they return to their jobs.

TOPICS:

1. Project Goals/Objectives
2. Target Groups/Project Strategies
3. Strategic Objectives and Targets

Module VIII: Planning for Project Implementation

GOAL: To provide participants with the skills needed to identify, plan, and successfully carry out the multiple activities of their country projects and future projects and programs.

TOPICS:

1. Introduction to Implementation Planning
2. Activities and Resources
3. Organizational Chart
4. Coordination
5. MIS
6. Management of Materials & Supplies
7. Scheduling
8. Financial Management
   a. Sources of funds
   b. Expenditures
   c. Budgeting
   d. Financial control

Module IX: Planning for Monitoring and Evaluation

GOAL: To inform participants of the critical importance of effective monitoring and evaluation to any project or program and provide them with the requisite skills to monitor and evaluate their own projects and programs in the future.

TOPICS:

1. Definitions and Explanations of Monitoring and Evaluation
2. Monitoring and Evaluation Process

Module X: Human Resource Management: Selected Issues

GOAL: To sensitize participants to effective ways of motivating, supervising, and leading their staff.

TOPICS:

1. Introduction to Human Resource Management
2. Motivation
3. Supervisory Approaches, Styles, and Instruments
4. Leadership Theories and Styles
5. Training as a Function of Management
6. Performance Planning and Appraisal
7. Emerging Trends in Human Resource Management

Module XI: Field Trip and Processing

GOAL: To enable participants to synthesize and apply what they have learned in this course by conducting a management audit of a local organization.

Module XII: Individual/Country Projects

GOALS:

1. To enable participants to take back to their jobs a realistic project proposal that will address an identified family planning/health problem in their own working situation.

2. To equip participants with a method they can use to develop projects and programs in the future.

TOPICS:

1. Writing the projects
2. Presentation of project summaries, with feedback on content and presentation style

Module XIII: Winding-up Activities

GOAL: To allow participants to evaluate their individual achievements during the course and provide CAFS with honest appraisals that can be used to help shape future management.

TOPICS:

1. Post-test
2. Participants' End-of-course Evaluation and Analysis
3. Feedback on Post-test, Country Projects, and General Level of Participation during the Course
4. Closing Ceremony

ANNEX 5

MEMO TO THE CAFS DIRECTOR

To: Professor H.W.O. Okoth-Ogendo, Director CAFS
From: Ezekiel Kalaule, Ann Buxbaum
Re: Completion of Curriculum Revision for CAFS FP Program Management Course
Date: 19 April, 1993

This memo presents a proposed scope of work for the production of a final version of the Trainers' and Trainees' Manuals and Book of Readings for the CAFS FP Program Management Course.

Rationale

The prodigious efforts and considerable talent of the team have produced a completely restructured course, tighter and more logical, with new activities and approaches. It has been clear from the beginning that it is not possible to completely redesign a 6-week course and come up with finished materials in three weeks. We believe that the following work will be required to produce the high-quality, lasting curriculum materials this course deserves.

Scope of Work

a. Editing for consistency of style, content, and methodology within and between manuals.

b. Careful selection of current readings, relevant to the learning and working needs of the participants, and their incorporation into the Book of Readings.

c. Development of up-front material for the Trainers' Manual, to include guidelines and checklists for planning, conducting, and evaluating the course; proposed schedules; sample forms; brief descriptions of training techniques; overall training guidelines; post-workshop requirements, etc. Some of these materials will be modified for inclusion in the Trainees' Manual as well.

d. Revision of evaluation instruments to conform to the new course content and emphases.

e. Revision and amplification of the Keutaga case study which is the essential tool used to lead participants through the elements of the planning process.

f. Final production of the three manuals.

Level of Effort

We believe that these tasks can be accomplished with 4 weeks of work for Ms Buxbaum, 2 weeks for Mr Kalaule. Two weeks for Dr Ade Adelakun, 1 week for an external reviewer, and 2 weeks of an administrative assistant. We propose that Mr Kalaule, Dr Adelakun, and Ms Buxbaum work together during two of those weeks in Boston, drawing on the resources and facilities available at Management Sciences for Health, including the presence of a reviewer who is an experienced trainer familiar with CAFS and its prospective course participants. We are tentatively scheduling this activity to begin either 2 August or 9 August, to be determined by Dr Adelakun's availability.

We are seeking support for this activity from the USAID Missions through the FPMD Project, from the SEATS Project, and from USAID/REDSO.

INCURRED AND PROJECTED COSTS FOR REVISION OF CURRICULUM FOR CAFS FAMILY PLANNING PROGRAM MANAGEMENT COURSE

Costs Incurred to Date

FPMD		
Personnel:	Ann Buxbaum for 15 days	$6975
Airfare:	Round trip Boston-Nairobi	3900
Per diem:	12 days Nairobi, 2 days travel	1735
	TOTAL	12610
CAFS		
Personnel:	Ann Buxbaum for 5 days	$2325
Per Diem:	7 days Nairobi	870
Local Transportation:		50
	TOTAL	3245

Projected Cost Estimates

FPMD		
Personnel:	Sylvia Vriesendorp for 5 days	$2200
	Administrative Assistant for 10 days	1800
	Production of manuals:	1000
	TOTAL	5000 - 5250
CAFS		
Personnel:	Ann Buxbaum for 20 days	$9300
Airfare:	Round trip Nairobi-Boston	3000
Per diem:	14 days Boston, 2 days travel @ $131	2100
Local Transportation:		50
	TOTAL	14450 - 15175
SEATS		
Airfare:	Round trip Harare-Boston	$3000
Per diem:	14 days Boston, 2 days travel @ $131	2100
Local Transportation:		50
	TOTAL	5150 - 5410

ASSUMPTIONS FOR PROJECTIONS

1. The totals are presented as a range whose upper end allows for 5% inflation.
2. Salaries for MSH staff are illustrative only.
3. Boston per diem is based on most recent A.I.D. rates.
4. Plane fares are estimated.