

Health Opportunities in Development

*A Course Manual on Developing Intersectoral
Decision-making Skills in Support of Health Impact Assessment*

PART I Course basics

PART II Course implementation



Robert Bos, Martin Birley,

Peter Furu and Charles Engel



World Health
Organization



Liverpool School of
Tropical Medicine



Danish Bilharziasis
Laboratory



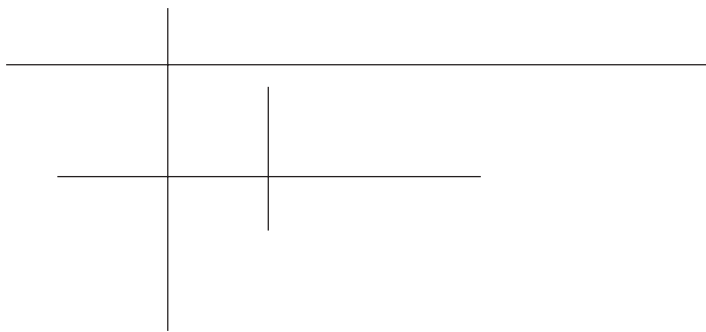
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PART III: COURSE MATERIAL

Part III of this publication is in a separate volume and contains all course training materials. The two volumes are accompanied by a CD-ROM with the integral text of the manual in electronic format, together with the reports of all five pilot courses, background textbooks and visual training aids.

About PEEM

The joint WHO/FAO/UNEP Panel of Experts on Environmental Management for Vector Control (PEEM) was established in 1981 to create a framework for inter-agency and inter-institutional collaboration, with a view to promoting the extensive use of environmental management for disease vector control as a health safeguard in the context of land and water resources development projects and for the promotion of health through agricultural, water resources, environmental, human settlement and health policies, programmes and projects. The interagency collaboration originates from Memoranda of Understanding between the three agencies covering the areas of prevention and control of water-borne and water-associated diseases in agricultural development, rural water supply and waste water use, agriculture, forestry and aquaculture. Recently, the Executive Heads of WHO and UNEP re-affirmed their collaboration in this area under a broader Memorandum of Understanding.

Current WHO activities in the context of PEEM cover the areas of health impact assessment of development (with inputs into the work of the World Commission on Dams, and a Memorandum of Understanding concluded with the International Association for Impact Assessment), research and development in the field of environmental management to promote reduced reliance on pesticides for vector control and contributing to an issues framework on biodiversity and its importance for human health. The PEEM network consists of eleven collaborating centres and its secretariat is based in the Water, Sanitation and Health Unit in WHO headquarters, Geneva.

About IMPACT

The International Health IMPACT Assessment Consortium is a joint initiative of the Department of Public Health, University of Liverpool, and the Liverpool School of Tropical Medicine. IMPACT provides research, training and technical assistance in health impact assessment. It runs training courses in the United Kingdom for agencies engaged in HIA, an annual conference and a website. IMPACT's international projects include technical assistance and capacity building to regional and central offices of WHO, DFID, national governments, and other agencies. IMPACT is a WHO Collaborating Centre and, through its manager Martin Birley, it is linked to the International Association for Impact Assessment. More information can be found on its website www.ihia.org.uk

About DBL

The Danish Bilharziasis Laboratory (DBL) is an independent institution affiliated with the Danish Ministry of Foreign Affairs/Danish International Development Assistance (Danida) and officially associated with the Faculty of Science, University of Copenhagen and with the Royal Danish Veterinary and Agricultural University. DBL also serves as a WHO Collaborating Centre for Applied Medical Malacology and as a joint WHO/FAO/UNEP/UNCHS Collaborating Centre for Disease Vector Control in Sustainable Development. DBL is involved in training, research and technical co-operation within the field of human health in developing countries. DBL receives the majority of its financial support through Danida. More information can be found on its website www.bilharziasis.dk

About CHES

The Centre for Higher Education Studies is based in the School of Lifelong Education and International Development, Institute of Education, University of London, UK. The Institute offers a wide range of postgraduate degrees. Its candidates for Doctorates of Philosophy or Doctorates of Education come from all continents and engage in an extensive spectrum of research. The Centre for Higher Education Studies is also known for its assistance to institutions of higher professional education in developing as well as developed countries for the design and implementation of innovative curricula.

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Preface

Healthy public policy is increasingly cited by development experts as a key aim of governments, bilateral agencies and multilateral development banks. By this they mean that all publicly funded development in any sector should contribute positively to human health. This helps maintain social or human capital which is essential if development is to become sustainable. It is an aim with which all should agree. But how is it to be achieved? There are many possible instruments. One of these is to use prospective impact assessment.

Environmental Impact Assessment (EIA) is an established procedure, well known in most countries of the world, increasingly required by law and by international development agencies. Yet EIA does not cover all dimensions of human health. It often overlooks the cross-cutting nature of health. Consequently, Health Impact Assessment (HIA) has emerged as an instrument for ensuring healthy public policy. It is also an instrument to generate health safeguards in the planning and design stages of development projects. It may be integrated with other forms of impact assessment, or stand alone.

Having such an instrument is critically important, but it is not enough; staff with responsibility for development planning need the skills to use it. What are those skills? Some are straight-forward and technical. Others require a new way of thinking. Impact assessment is an intersectoral activity. This means that professional staff from widely different disciplines need to work together, sharing questions and answers. That is how the project of PEEM (the WHO/FAO/UNEP Panel of Experts on Environmental Management for Vector Control), which started out as a simple exercise in teaching new technical skills, became a course in the development of intersectoral decision-making skills that makes use of modern thinking on how adults learn.

This outstanding manual explains what that means, presents methods and frameworks, and provides the generic materials for national authorities to adapt the course to their own needs using local resources. Beyond the context of Health Impact Assessment, it sets the stage for a learning process to develop skills that are required to tackle any problems of an intersectoral nature. In an increasingly interconnected world, such skills are rapidly becoming indispensable.

In every country that aspires towards using Health Impact Assessment there is a need to train many professionals in these skills. International agencies, such as the World Health Organization, already help by running one or two short courses a year for 20-40 people. But this would not disseminate the skills widely enough. Therefore, a course was needed that could stand alone and run sustainably in local training institutes. This manual addresses that need. It is the authors' hope that readers will use the material provided,

adapt it in their own way, and create for themselves courses that can be run as often as needed to disseminate the ideas to an ever-widening audience in response to an ever-increasing demand.

For that is the reality of today: the demand for these skills is increasing. International bodies such as the European Union, bilateral development agencies and multilateral development banks, and national governments themselves are adopting healthy public policy as part of sustainable development. They have recognised that health is not the responsibility of the health sector alone. They are searching for appropriate instruments and suitably skilled staff. This manual contains one approach in response to this demand. Not the only approach, nor the final approach, but a major contribution. I highly recommend it to public health specialists, environmentalists, education professionals, policy makers and human resources managers alike. It needs to become the cornerstone of health impact assessment by all development agencies.

Robert Goodland

Mclean, Virginia
United States of America
June 2002

PART I

COURSE BASICS



1 Introduction to the manual

1.1 For what purpose?

Management-oriented capacity building

The purpose of this manual is to provide guidance in the design, implementation and evaluation of a course that aims to build and strengthen capacity in reasoned decision-making, team building, and inter-professional and inter-sectoral collaboration. The context of the course is socio-economic development in its broadest sense. The content focuses on health impact assessment as part of the development project cycle.

1.2 For whom?

This manual is intended for a diverse readership. Broadly, the intended audience consists of those who wish to commission, support or offer a course with the above stated aims. This audience includes:

Mid-level civil (public) servants

- *Educational institutions across the world* that wish to establish or run a course of this kind. Examples of participants of such a course are midlevel staff of government ministries and agencies whose duties include the regulation of development projects. The education authorities will be in institutions that serve the training needs of professionals who meet this profile.

Intersectoral bridge building

- *Ministries and technical assistance agencies* that recognise the need for developing capacity in intersectoral collaboration and seek a means of addressing that need.
- Those concerned with management training for building teams that bridge gaps between units of any size with competing aims or budgets; such units may include departments, divisions, companies or ministries.

The manual will also be of interest to:

- Agencies concerned with establishing or running short courses on any subject using a problem-based learning approach.
- Students of education, management or development interested in the methods and procedures that the authors have adopted.
- Those who are interested in the process of negotiation with other sectors on cross-cutting issues, such as health and environment.
- Those whose duties include regulation of development projects, procurement, tendering, advising or planning.

The course is appropriate for any development context; water resources development is used as the illustrative contextual example.

Common problems

Conceiving and running a short course in a developing country for a diverse audience of professionals has a number of common problems independent of the content of the course. These problems range from understanding how professional people acquire new knowledge and selecting individuals to attend a course, to course sustainability. Sustainability, in

this context, means ensuring that the course can continue to run without international support.

This manual sets out the steps that need to be taken to prepare for and organize the course. It also identifies potential problems, describes how they may be overcome, and indicates what approaches may be more, or less, successful. The proposed approach is based on a six-year course development period during which five pilot courses were held in Zimbabwe, Ghana, Tanzania, Honduras, and India.

1.3 Structure of the manual

Part I and II of this manual are divided into a number of distinct chapters as identified in the Table of Contents. Chapters in Part I focus on **basic principles in a generic way**, using experiences from the pilot courses to exemplify principles of developing intersectoral decision-making skills. Chapters in Part II describe the **practical aspects** of preparing for and running a course to develop such skills in the context of Health Impact Assessment (HIA) of development projects.

In other words, Part I addresses method generically, Part II addresses process in a specific context. A method is required by which busy professional people can learn to apply new knowledge and skills through discussions with their colleagues. The process refers to planning and conducting a specific course in a step-by-step fashion. **Both method and process are, however, generalisable and stand independently of the content.**

Part III of the manual contains the **course materials** (see separate volume). These were developed for and tested in the pilot courses. They address the concern that water resources development projects should not be designed, operated, or maintained in a way that would endanger human health.

The accompanying CD-ROM contains the complete text of parts I, II and III of the manual in electronic form. Moreover, it contains electronic files of relevant WHO publications, text books and visual training aids.

*Three parts: basics,
practice and materials*

CD-ROM

2 The learning approach

2.1 Course participants and aims

Building on participants' experience and expertise

This course is designed for mid-level managers from a wide range of ministries, departments or local agencies. Typical examples include directors of departments, chiefs of units or heads of divisions. They are the professionals who translate government policy into programmatic activities and guide the planning and implementation process through monitoring and evaluation. They may be working at central, provincial or district level. The course builds on their considerable professional expertise and experience. In addition to extending the participants' ability to make reasoned recommendations on submissions related to development projects, the course aims **to develop important competencies necessary for inter-professional and intersectoral collaboration.**

The participants are valued colleagues

From this perspective, the course needs to treat the participants as competent adults and as valued colleagues who will have much to contribute to each other's learning. They will need to feel at ease and develop mutual respect and trust, if they are to value each other's expertise and enjoy working together. At first, their colleagues' way of thinking may be as unfamiliar as their "jargon".

Traditional teaching is inappropriate

Clearly, a classroom atmosphere, sitting in serried rows on uncomfortable seats and enduring less than interesting expositions from unknown experts, is unlikely to meet the requirements of the course. There is ample empirical evidence that adults learn best when they can be actively tackling situations/problems/tasks that they can accept as interesting and worthwhile. They learn most effectively when they are exposed to a useful experience in a recognisable context, and then can reflect on that experience. In addition, it is important to ensure that the learning is cumulative. This means that what they have experienced and learned already, is revived and reinforced, so the new learning can be added by building on their previous learning achievements.

Keys to effective learning

Group work

These requirements are met most effectively by problem-based task work in small groups. The formation of multi-sectoral groups of participants is, therefore, one of the critical starting points of this course. The participants are the key resource. The added value of group work lies in bringing participants of different sectoral affiliation together.

Emotion and logic: two important determinants

Much of the participants' learning will be influenced by emotion — how they feel — rather than by logical reasoning. Learning to work with others and to feel comfortable in exchanging information, **in effect giving and receiving power**, requires quite deliberate planning of the course. For example, the course starts with a straightforward sharing of knowledge and experience that is accessible to them all. This is the participants' introduction to the other members of their group, each of a different profession and from a different sector. This is also their first experience of working together and pooling information, in order to accomplish a

Information is the currency of power

Participants learn from each other

common task. The first experience will be followed by increasingly more complex tasks that have to be completed in progressively shorter periods. This increasing intellectual and physical pressure fosters “bonding” within the group — the creation of mutual reliance within the group. As an expression of this process, one may find that by the third day participants no longer sit at breakfast with colleagues from the same ministry but with colleagues from their task group.

2.2 Group work

What happens when the groups settle down to carry out their tasks? Unlike conventional educational practice:

- Pre-course reading materials are not provided.
- Seating is arranged in groups rather than rows.
- The participants are the main source of knowledge.
- Communication is through active participation rather than lectures.
- Outputs are joint responsibilities.

In the letter of invitation, participants are asked to collect and bring with them information on procedures that are followed in their sector when planning development projects.

Pooling information — sharing power

As there are no lectures from experts, participants will have to start by **exploring** what information is available within their group, **share** and **qualify** this information, and **synthesize** it into a final output, just as they would have to do in any real-life situation. As the group commences its work on a series of relevant tasks, the participants will identify what further information they need to obtain from documents that are made available to the group, from publications in the course library and from consulting the local resource persons (see Chapter 7).

Non-expert tutor/facilitator

Each group of participants has a non-expert tutor, who will not act as a teacher but as a facilitator and who helps and supports the work of the group (see Section 4.2.1). The group will progress through the logical steps of the task by following an agreed procedure. The group will end each task by producing a report that includes their findings, conclusions and recommendations. Other task outputs may include Terms of Reference (TOR), procedural plans or a Memorandum of Understanding. This approach to learning is known as “problem-based learning” (Engel, 1997)¹. It is based on the process by which each of us learns quite naturally in everyday life.

*Problem-based learning**Plenary introduction*

Each new task is introduced during a plenary session (**never, however, in the form of a lecture!**). The intersectoral groups of participants sit around separate group tables, to create a more informal atmosphere. This informal

1) Engel, C.E., 1997. Not just a method, but a way of learning. In: Boud, D. and Feletti, G. *The Challenge of Problem-based Learning* (2nd edition), Kogan Page, London

set-up encourages the groups to seek clarification from the course coordinator, so that everyone can be quite clear about the nature of the task ahead.

Use of Task Guide

Following the plenary session, each group goes to its own workplace. The group tutor will start the group work by distributing a Task Guide. This is accompanied by a letter of remit and a timetable for the task. Task Guides have been designed to guide the group's discussion. Questions and instructions at the end of each page guide the group's thinking and decision-making. The next page may start with feedback — confirmatory information related to questions and/or instructions on the previous page. It would defeat the aim of the Task Guide if the group were to look at the next page before arriving at a consensus on the questions asked. Task Guides and letters of remit can be found in Part III of this manual.

Expert consultation

At any time, the group may decide that it needs clarification or expert advice. For issues requiring an immediate clarification to allow the group to proceed with its work, the tutor will arrange for a consultation with the appropriate resource person (see Chapters 6 and 7). Clarification of less urgent issues can usually wait until the next plenary session, when the discussion with the resource person will benefit members of the other groups as well.

Oral report

Every task will end with an oral presentation by each group of its report, followed by a plenary discussion with the course staff, including the resource person(s).

The practical aspects of applying the above principles and methods in the implementation of the course are discussed in detail in Chapter 7.

3 Design of Task Guides

Steps in the development of Task Guides

The design of Task Guides requires six consecutive steps:

- Definition of the aims of the course and specification of overall objectives — what the participants will be expected to be able to do by the end of the course.
- The educational approach — how the participants will be helped to attain the objectives.
- The overall design or construction of the course — the cumulative sequence of learning and the activities that are to support learning in a realistic context.
- The specification of objectives for each sequence of learning, the knowledge, understanding and skills that will be needed.
- An outline of the output of each step of the course.
- The specification of any papers, documents or books that should be distributed to individual participants or made available in the course library.

These steps are elaborated below using the design of the Task Guides for the pilot courses as a reference — the steps are, however, **generically valid** for the development of all materials **for any task-oriented problem-based learning course**.

3.1 Definition of the aims of the course and specification of the overall objectives

Aim of a course

The aim of a course of this type is to strengthen the capability of mid-level officials to engage successfully in an intersectoral dialogue irrespective of their own sectoral affiliation. In the case of the pilot courses, the aim was for participants to set the framework for the assessment of the health impact of proposed development projects, appraise reports of consultants describing such impacts and arrive at reasoned recommendations to senior colleagues, through active intersectoral dialogue.

Objectives and expected outcomes

The objectives of the Task Guides specify what the participants are expected to be able to do by the end of the course. For example:

- Recommend whether a full HIA is necessary.
- Formulate Terms of Reference for consultants.
- Appraise consultants' HIA reports.
- Formulate intersectoral health promotion plans.

3.2 Decide on the time available for the course and the educational approach

Experience from the pilot courses

The length of any course for adult learning will be a trade-off between achieving a number of objectives and the period of time a professionally active participant can be away from his or her duties. The resulting length has a bearing on the choice of learning approach to be used and the level

of detail to which the course covers its subject matter. As argued in Chapter 2, the aims and the essential objectives of such courses can be attained most satisfactorily through the use of a problem-based learning approach. Experience from running the pilot courses revealed that, in the case of developing skills for intersectoral decision-making in relation to assessing the health impact of water resources development, the complexity of the essential objectives required a course of at least 18 days in duration.

Dividing the course in two parts

One option that was not tested in the pilot courses is to split the course in two parts, delivered with an interval of several months. This would overcome objections against an uninterrupted three-week absence of professional staff. Such a schedule would to some extent reduce the bonding process between professionals of different backgrounds. It also remains to be seen whether all participants would effectively be released to attend the second part. An interruption, most logically scheduled after completion of Task 2, would, however, allow for a real Health Impact Assessment to be commissioned and carried out. The participants would then have authentic material to work with in Tasks 3 and 4. The appraised HIA report would be a valuable additional output of the course.

3.3 Overall design of the course

The task-based learning approach requires that the overall task should be subdivided into essential component tasks. The cumulative learning effect depends on the sequence of sub-tasks being similar to the order in which issues pertaining to the main task would normally be tackled. At appropriate points, brief tasks that consolidate or synthesize newly acquired knowledge may be added. In the pilot courses, the sequence was as follows:

Sequence of Tasks

- Construct a framework for comprehensive development planning.
- Explore the requirements and activities associated with a rapid health impact assessment.
- Appraise a health impact assessment report.
- Appraise the recommendations for health promotion and safeguards.
- Construct generic Terms of Reference for health impact assessment.
- Formulate an intersectoral plan of action and a Memorandum of Understanding.

Need for field visits

Other supporting learning experiences should be considered. The participants would here need opportunities for field visits to gain first-hand experience of the issues. These visits need to be integrated appropriately with the tasks and with time for relaxation.

3.4 Specification of objectives for each Task

Aim of Task

The following example is an extract from the Task Guide for Task 3.

The aim of this Task is to learn how to appraise a health impact assessment that has been carried out in association with an environmental impact assessment.

Main objective

The main objective of the Task is to decide whether the quality of the assessment procedure and the conclusions warrant appraising the recommendations.

Enabling objectives

The enabling objectives are:

- Decide whether the assessment conforms to the original Terms of Reference and whether these were adequate.
- Verify the objectivity of the assessment and identify any important biases or unforeseen obstacles.
- Decide whether the assessment procedure allowed for the data and their interpretation to be sufficiently comprehensive and credible to support the conclusions.
- Decide whether the conclusions follow logically from the data collected, and whether they are accurate, comprehensive and probable.

Output

The output of Task 3 is an appraisal report focusing on the assessment procedure and its conclusions.

Define the learning questions

The next step is to consider what knowledge, understanding and skills are needed for each of these enabling objectives. Continuing with the example of Task 3 enabling objectives, the following questions were considered to lead the participants to explore the desired learning:

- Were the Terms of Reference adequate for a meaningful assessment?
- Was objectivity compromised by conflict of interest, timing, budgeting, lack of expertise, or lack of access to information?
- Was evidence collected from published and unpublished sources and cross-checked?
- Was a wide range of key informants and all sections of the community consulted?
- Were the scope and depth of the assessment sufficient?
- Was the synthesis of the information collected adequate?
- Were the conclusions justified?

Such questions relate directly to the reality of the task at hand. The participants need to refer constantly to the contextual documentation (in the case of this example: the project documentation for planned water resources development) and to the HIA and Environmental Impact Assessment (EIA) consultant reports.

3.6 Specification of books and papers

References for further reading

Each Task Guide is accompanied by a list of references for further reading. These are sub-divided into copies given to all participants for them to keep and copies available in the library. Participants are expected to consult these references as they carry out the task.

4 Structure of the course

4.1 Objectives

Acquired skills

The design of the course is based on the objectives to be achieved by the participants — what they should be able to do as a result of completing the course successfully. At the end of the pilot courses, for example, participants were expected to have the capability to manage or contribute to the health impact assessment of water resources development projects through inter-professional and intersectoral collaboration. In this case, the skills to be acquired included:

- Critically appraise project proposals and consultants' reports.
- Make reasoned recommendations.
- Write succinct, logically structured reports.
- Formulate Terms of Reference.
- Plan procedures, such as action plans.
- Establish institutional arrangements, for example through a Memorandum of Understanding.
- Convincingly present the results of the above orally to senior colleagues.

A realistic context is essential

These objectives can only be achieved if they are fostered in a realistic context. The example materials in Part III of this manual focus on the health impact assessment of water resource development. Health is fundamental to the social and economic well-being of communities. Water resources development is closely related to health because it provides clean drinking water, may change pollution levels or affects vector-borne diseases. Water, in particular its equitable use, will be a major issue in the 21st century, in order to provide power, irrigation and drinking water for the world's increasing population.

This manual applies to any course with the aim of building capacity in intersectoral collaboration. The training materials in Part III can be adapted to any intersectoral development context.

Generic and contextual materials

The training materials contained in this manual assist the process of the course, i.e. they are designed to take participants through their tasks in a logical, step-by-step sequence.

For each individual course, a context will have to be selected within which the tasks are performed. In the case of the pilot courses, water resources development projects (usually irrigation development projects) were selected that were in the planning stage. Each group of participants was given a set of the essential project documents (basic project proposal, feasibility study, general surveys of the project area, report of the Environmental Impact Assessment -EIA- and others). These are the contextual materials that enable participants to carry out the task in a realistic setting.

4.2 The course programme

The structure of the course needs to consider: the programme, and the human and material resources. This section focuses on the course programme.

The length of the course

The length of the course is determined by the number of tasks to be accomplished, their level of difficulty, and the amount of time needed to complete each task in adequate depth. Other considerations include the time needed for the induction of tutors, the opening and closing ceremonies, field visits, holidays, and other ancillary activities. The pilot courses occupied up to 20 days. The total time will be a trade-off between the needs imposed by the course objectives and the limits set on absences from normal duties by participants and course staff. Up to two full days are needed for the induction of the group tutors before the course can begin. Day one of the course programme corresponds to the first working day of the week. A more detailed description of the sequential activities and the programme of local resource persons are presented in Part III. In the following sections, components of the course programme are presented, in chronological order, in terms of their function in the overall course and their contribution to the course objectives. A generic timetable, derived from the experience of the five pilot courses, is presented in Table 1.

Facilitators not teachers

Pacing, clarification, referral and linkage.

4.2.1 Induction of tutors

The term “non-expert tutor” has been used to emphasise that these tutors should facilitate their group’s work but not act as instructors. The Guide for Tutors (see Part III) sets out their responsibilities. Chapter 6 describes how they are to be selected and recruited. Chapter 7 describes in detail their induction into the concepts, approaches and procedures of the course. They should be introduced to each task guide. This will enable them to pace their group, in order to complete the respective task within the allocated time. It will also enable them to clarify any ambiguities that the participants may identify in the Task Guides. The tutors need time to familiarise themselves with the natural history of group dynamics and group pathologies, so that they can facilitate smooth and enjoyable group interaction. They try to maintain a balance in the participation of individual group members, are alert to identifying signs of conflict and apply conflict resolution methods. They recognise situations where a group gets stuck in a dead-end and needs referral to a local resource person. Finally, at a different level, they provide an essential feed-back link for the day-to-day monitoring of group performance and the early detection of general as well as group-specific problems.

4.2.2. Registration of the participants

This is the crucial first opportunity to make each participant feel valued as an individual. The course administrator will welcome each participant and help them to settle in and to familiarise themselves with the geography of the location and its facilities (for the practical aspects, see Chapter 7).

Start at the same time

Every effort should be made to ensure that all participants start the course together. It can be very disruptive for a group if one of its members does

Table 1. Timetable of training course activities

Day	-2	-1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Induction of tutors	X	X																		
Arrival and registration of participants		X																		
Formal opening		X																		
Introduction			X																	
Task 1			X	X																
Presentation				X																
Task 2				X	X	X		X												
Presentation										X										
Task 3										X	X									
Presentation												X								
Task 4												X	X							
Presentation														X						
Task 5														X	X					
Presentation															X					
Task 6																	X		X	
Presentation																				X
Conclusion and evaluation																				X
Field trips							X											X		
Formal closing ceremony																				X
Holidays									X							X				

not arrive until after the start of the course, is absent during the course, or leaves before the end of the course.

In the pilot courses, as a rule, participants who arrived after the start of Task 2 were denied access to the course, and those who chose to leave early were not given the Certificate of successful completion.

4.2.3. The official opening and closing ceremonies

Reasons for opening ceremony

The degree of formality, or informality, required for the opening and closing ceremonies will depend on local circumstances. The opening ceremony may perhaps need to be rather more formal, particularly if co-sponsors, government and national or international agencies are represented. The host institution, the course staff, and the participants may wish to feel that their involvement is noted.

Aims of the closing ceremony

The closing ceremony is best scheduled on the evening of the final full course day. It should be more of a family affair. In essence, the closing ceremony should acknowledge and reinforce the bonding that has taken place. The participants have successfully completed what will have been a demanding course. They are now members of a group that can and is willing to collaborate with each other across the boundaries between ministries, departments, and agencies.

The only formal event during the closing ceremony will be the presentation of the certificates of successful completion of the course.

Plenary sessions

4.2.4. The daily programme

Each morning and afternoon starts with a plenary session. This serves a number of purposes.

- The plenary session can be used to introduce a new task or to resolve any outstanding queries about an on-going task that a group has not been able to deal with to its satisfaction.
- It is used for the oral presentation of the task reports.
- It ensures that all groups, their tutors, and resource persons are present at the programmed time.

Plenary for groups' reports

The local resource persons (see also Chapters 6 and 7) are expected to attend these plenary sessions to correct misconceptions, to answer outstanding queries, and to relate the groups' work to local conditions and circumstances. The groups will require guidance on how to present their written and oral reports.

The tasks

The tasks represent a logical set of learning activities associated with the intersectoral decision-making process. The group work on tasks will normally follow the morning and afternoon plenary sessions. The design of Task Guides is explained in the previous chapter and their use in Chapter 7.

Other activities

Three additional activities are included in the programme: field trips, a debate, and sessions to elicit the perceptions of the participants as part of monitoring and evaluating the course.

Careful planning of field visits

4.2.5. Field trips

Two one-day field trips are designed to provide the participants with relevant practical exercises and invaluable experience of the environmental, occupational, social and health conditions that relate to the project proposal. In the spirit of the course, these trips are not simply events to get a visual impression of project sites. They entail interaction and discussion between course participants and members of local communities, and briefings followed by discussions with the technical staff of various ministries and local government working on the spot. The time at which the trips are scheduled in the course programme is crucial to the tasks that they support. For further details, see Chapter 7 and the Guide to Field Visits in Part III.

The plenary session of the afternoon prior to the field visit serves to brief the participants. This briefing should cover objectives, programme, logistics, and expected outcome of the visit. Another plenary session should be arranged to debrief the participants afterwards and let them reflect on what they have experienced.

Ups and downs in course mood

4.2.6. The debate

It is normal that the attendance of a lengthy and demanding course, away from home and family and from the daily workplace, has an impact on the state of mind of individual participants. This manifests itself in the atmosphere of the course as a whole. In the first week the mood tends to be upbeat and slightly nervous. There are many new things to be discovered: new people, a new subject, a new learning approach. There is also a sense of insecurity about individuals' roles and their place in the order of things. In the last week excitement mixes with some nostalgia. Participants feel they are mastering the subject matter, roles have become clear and the end of the course (i.e. the Certificate and their return home) is in sight. The group bonding process will have done its work and there is, therefore, also the realization that new friendships may come to an end.

It is during the second week that the barometer of the course mood usually hits a low. The pressure is on: there are difficult tasks to be completed, the available time to complete them is more limited than in the first week and the end of the course is still far off.

Purpose of the debate

At this point, a debate is organized. It is a light-hearted evening event intended to break the routine. Its purpose is to give the participants an opportunity to release the pressure that has built up and to interact with each other differently than in what has now become routine group work. It also serves to remind them that working on a serious issue does not imply one cannot have a good time as well.

Doubts were raised, when this course component was introduced, whether it was sufficiently universal to cut across different cultures. While there certainly was a more instant recognition of debate procedures among participants from countries where there is an Anglo-Saxon teaching tradition, its success at the course in Central America proved such doubts to be unfounded.

Purpose of monitoring

4.2.7. Course monitoring and evaluation

Monitoring and evaluation activities are fully integrated into the course programme.

The purpose of monitoring is two-fold:

- To correct any adverse commissions or omissions, or to exploit further any particularly successful elements in the conduct of the course as soon as they occur.
- To gather information for the improvement of future courses.
- To provide the participants and staff with an opportunity to "let off steam".

Perceptions of the participants

Several methods are used to monitor the course as it proceeds. For example, at the midpoint of the course programme, the participants join in a Nominal Group Process. Adaptations and improvements can thus be included in the second half of the course (see Chapter 8).

Evaluation serves strategic decision making

The purpose of evaluation is four-fold:

- To establish the basis for a strategic decision about the future of the course. Is the outcome sufficiently successful in achieving course aims and objectives to justify further courses? Are major changes required? Should the course be abandoned altogether?
- To clarify whether the conduct of the course was sufficiently acceptable to the funding agency, the organizers, staff, and participants of the course.
- To confirm whether or not the course is sustainable in its balance of acceptability, effectiveness and efficiency - time, effort, facilities and resources that have been expended by all who have been involved in the course. Sustainability will be particularly important where the course depends solely on local resources.
- To produce evidence in sufficient quantity and quality for further improvements to be made to the course.

Both pre- and post-course questionnaires are used for course evaluation by the participants. The pre-course evaluation takes place during the course introduction. The post-course evaluation is scheduled for the final morning. Course evaluation by local resource persons and by non-expert tutors takes place at the end of their respective assignments. Further details can be found in Chapter 8.

5 Creation of an enabling environment

Key points in establishing the course

The course has special characteristics and requires an enabling environment that is different from that of conventional courses. The key points to be addressed include:

- Establish effective links with all public sectors well in advance of the course, to ensure adequate identification, nomination and participation of mid-level management staff.
- Ensure an optimal number of participants and an optimal composition of the group of participants in terms of public sectors represented and gender balance.
- Obtain the services of the right resource persons at the right time.
- Identify and induct tutors that can guide the group learning process without interfering in the technical issues.
- Identify and/or adapt all course-specific learning materials and contextual materials, and have them available on time and in sufficient numbers.
- Identify a venue that offers all necessary facilities and is sufficiently isolated, so that personal and professional obligations do not interfere with course attendance.

Two important preconditions

Two vital determinants of the level of success in organising the course are:

- The sectoral affiliation of the main organizer or organizing institution.
- The geographical scope of the course: is it confined to one country or will it cover several countries in a region?

5.1 Sectoral affiliation of the organizer

Special pleading

This course aims at developing management skills that ensure that health is being addressed in development as a cross-cutting issue. Therefore, a course initiative that emerges from the health sector may be perceived by the other sectors as representing special pleading by public health authorities. Consequently, public sectors other than the health sector may be reluctant to nominate the most appropriate number and level of staff to participate. They may feel that the objectives of the course are of marginal importance to their sector and have little merit to receive support from their already limited training budgets.

The hidden costs

An important argument will be that improved intersectoral action to assess health impacts will reduce the transfer of hidden costs to the health sector. Such arguments will only be appreciated by ministries with a government-wide outlook such as planning or finance.

Make the course relevant irrespective of any sectoral affiliation

The solution to this constraint is to ensure that the course is not perceived as a health sector initiative. The initial idea for the course will, most likely, arise in a health sector affiliated department or institution. A first important step, then, is to give the course a home in a sectorally neutral institution.

Administration and management institutions

In most countries, institutions for public administration and management exist. They play a key role in the training of civil servants. Their focus may be inclined towards economic and finance disciplines, but they usually address issues of development and strengthening of management capacity for a range of public sectors, as well as, sometimes, for the private sector. In recent years, many of these institutions have included environmental impact assessment and environmental management into their training programmes. A course entitled “*Health impact assessment of development projects*” will, therefore, not be something entirely novel. It may not be difficult to include it in the institution’s training programme.

Effective links

This type of training institution will often have effective links with various public sector ministries and institutions. In fact, senior civil servants in most ministries are likely to have received part of their training at the institute, so that a natural bond exists, based on confidence and credibility. This will further facilitate the organization of the course. Management training institutions usually also offer excellent facilities with the specific characteristics required for this course (see Chapter 6).

Promotional activities within the health sector

If the course is initiated in the health sector context, the initiating person or unit may also have problems convincing their own ministry that this is a valuable endeavour in which to invest staff time. In a typical setting, the Environmental Health Unit in a Ministry of Health will be the health counterpart in this course. If they exist at all, such units are usually marginal, under-staffed, and under-resourced. Attitudes in the Ministry may be influenced favourably towards developing intersectoral decision-making skills by organizing an internal seminar on the subject of health in development. The seminar can focus on HIA, health risk management, health promotion, healthy public policy and/or community involvement in health and development, through ownership and empowerment.

Other promotional activities in ministries of health may include:

- Making information on HIA available to health sector planners and decision makers.
- Collecting and publicizing case studies illustrating negative effects of development projects, preferably with a (health-)economic dimension.
- Presenting evidence of the potential of HIA in preventing negative health impacts.

Participants’ affiliation

The composition of the target audience of the course leaves some flexibility in the representation of certain development sectors such as agriculture, energy, infrastructure, industry, transport or housing. The more comprehensive the representation, the better! It should be realized, however, that the two sectors that must be adequately represented for the course to be a success are the health sector and the environment sector.

5.2 National versus regional context

Regional approach

Normally, the initiative to organize this course will arise at the national level. In some instances, the idea to strengthen intersectoral decision-making skills related to health impact assessment arises in a regional context. This is likely to happen in the context of cross-boundary projects to develop or use a certain natural resource. Examples include water resources development in an international river basin, or the exploitation of oil reserves that extend over two or more countries.

The pilot courses were carried out in both national and regional settings, the latter including a regional course comprising five countries in Central America, as well as a course for staff from departments in four States in India.

There are a number of complications that make the option of a regional setting the least attractive of the two:

- Too many different contextual projects.
- National sensitivities.
- Complications in the selection of local resource persons.
- False economies.

Too many different contextual projects

The course tasks are carried out in the context of a real development project. Bringing in participants from a number of countries, or states in a federation, means that each group works on a different project. At the start of the course, a series of presentations will need to be inserted into the programme on the nature and characteristics of each project. This provides the basis for understanding the task reports that are presented throughout the remainder of the course programme. Even with this basic knowledge of each project, interest levels at plenary presentations will be less intense and the plenary discussions will be more shallow. An exciting aspect of the task-based learning is the competition between groups and the different outcomes that individual group discussions yield. Competition is an underlying determinant in the bonding process and supports effective learning. Therefore, a regional course may be expected to be less successful in achieving its goals than a national course.

National sensitivities

In some cases, natural resources and their development may be of strategic importance or they may even be considered a matter of national security. This puts a constraint on the frankness with which planning issues can be discussed. It also limits the availability of documentation. When this is the case, it augurs poorly for the success of a regional course: the need for openness and mutual trust is likely to be overshadowed by regional distrust and lack of transparency.

Complications in the selection of local resource persons

Identifying local resource persons to provide technical support in a regional course is complicated. It is easier to find relevant and knowledgeable professionals for a national course than for a regional course. Chauvinism or other national sensitivities may obstruct the acceptance of a technical resource person from one of the other countries in the region. Resorting to

international staff from regional institutions (such as a regional development bank) defies the concept of local resource persons.

False economies

Finally, the idea that organizing the course at a regional rather than a national level provides economies of scale is not correct. The travel involved makes the course more expensive to run, and while it will cover a number of countries, it will result in only one person per sector per country trained. Considering the high turnover of staff, particularly at the middle management level of public sector institutions, this is hardly going to have an impact. In contrast, a national course will ensure that each public sector represented will have at least four of its middle level management staff trained at one time.

Conclusion

In the light of the above, it is strongly recommended that, even if the idea of organizing this course arises at the regional level, it be broken down in a series of national courses rather than one or more regional ones. Even where the geography of natural resources demands coordination between two or more countries on issues of health impact assessment, it is still recommended that the courses be held at the national level. At the same time, in each country, an enabling policy environment can be created that will allow mid-level staff that have participated in this training to engage in effective intersectoral action. Once this has been achieved, countries may work together, in order to harmonize their HIA policies. A development project that crosses international boundaries can then be planned with due attention to human health considerations.

5.3 Decentralisation

In most countries, processes of structural adjustment are underway or have been completed, with the aim of improving the effectiveness of government while containing costs. Public sector reform includes, among other things, decentralisation. While the decentralisation of decision-making about operational issues is usually not contested, the responsibilities for resource allocation often remain at the central level, creating a rather unworkable situation.

In principle, intersectoral collaboration should be facilitated by decentralisation, as the barriers that separate sectors at the central level (where competition for resources prevails) have little meaning at the district level (where teamwork is a daily routine, in order to deliver local solutions in response to local problems). It should, therefore, be easier to achieve the objectives of the course in a decentralised setting, with a more favourable climate for intersectoral action.

In reality, the situation is more complex. To begin with, decentralisation is seldom absolute. In a situation as alluded to above, where decisions on resource allocation continue to be made at the central level, it will be essential to create an enabling policy environment (preferably with a budget appropriation) for intersectoral action at the district level to be viable. Otherwise, professionals who participated in the course will have little opportunity to put their newly acquired skills to practice. There may also be

Implications of public sector reform

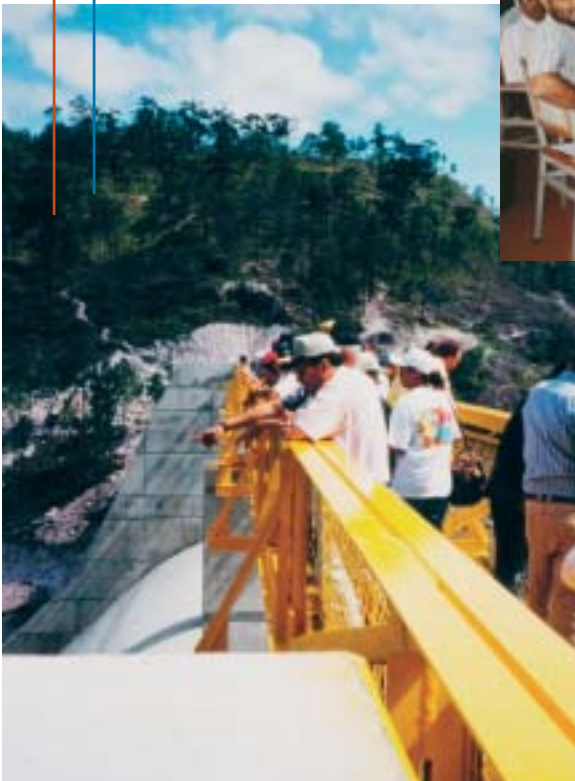
discrepancies in the level of decentralisation between sectors. In some countries, ministries of health have fully decentralised their environmental health services, while irrigation management may still be the responsibility of a central parastatal agency. As a result, course participants with different sectoral affiliations may operate at different levels in the system.

When to consider decentralisation

Decentralisation may also complicate the project planning process. Proposals for water resources development, for example, may not only move between ministries at the central level as the project cycle unfolds, but also between different administrative levels (central, provincial, district). This may complicate any impact assessment procedure. Options for intersectoral action in such a setting are described by Tiffen (1991)². The issue of decentralisation, therefore, deserves attention in the initial preparation, in the selection of course participants and, during the course, in the appraisal of Task 1.

2) Tiffen, M., 1991. Guidelines for the incorporation of health safeguards into irrigation projects through intersectoral cooperation. PEEM Guidelines Series 1, *Document WHO/CWS/91.2*, World Health Organization, Geneva

PART II COURSE IMPLEMENTATION



6 How to prepare a course

6.1 Getting started

Time and resources invested in laying the groundwork for this training course are time and resources well invested. The proposed subject and learning methodology are out of the ordinary and it is, therefore, important that the organizer:

First steps

- Rapidly assesses the needs that can be addressed by the course and generates evidence for these needs.
- Informs him/herself about the current status of relevant policies, programmes, projects and procedures in the different sectors.
- Identifies allies and potential adversaries in each ministry who may influence the process of organizing the course.
- Explores potential sources of funding that will make running the course a feasible and, possibly, sustainable option.

Once the course has taken place a couple of times, the effort invested in the basic preparations for the first few courses will provide a solid basis for its continuation. In the various relevant sectors, supporters of the course will then increasingly outnumber the sceptics.

The broad needs perspective

In most countries, Health Impact Assessment (HIA) of development policies and/or projects is a non-existent practice. Health may, however, be covered in a sectorally confined manner in Environmental Assessments. The needs for establishing HIA as a component of development planning, supported by an enabling policy environment, is best demonstrated by case studies of development projects that have had a negative impact on health. These are provided in the literature (e.g. Birley, 1995)³, but there may be close-to-home examples that carry extra weight for government decision-makers. In the analysis of such case studies, it is important to highlight the fact that costly negative impacts could have been prevented by an early recognition of the health risks, and by incorporating health safeguards into project planning, design and development.

6.2 Needs assessment

Capacity building needs

A next step aims to assist the human resources managers of the various relevant ministries and other public sector institutions in identifying capacity building needs to achieve and sustain effective HIA procedures. The problem and solution trees presented in Figures 6.1 and 6.2 will be helpful in this undertaking.

The course responds to the needs to achieve an enhanced understanding of both the potential and the limitations of HIA. It develops skills in intersectoral decision-making for a target audience of mid-level managers, among whom these are often so painfully lacking.

3) Birley, M.H., 1995. *The Health Impact Assessment of Development Projects*, HMSO, London

Figure 6.1. Problem tree - without health impact assessment

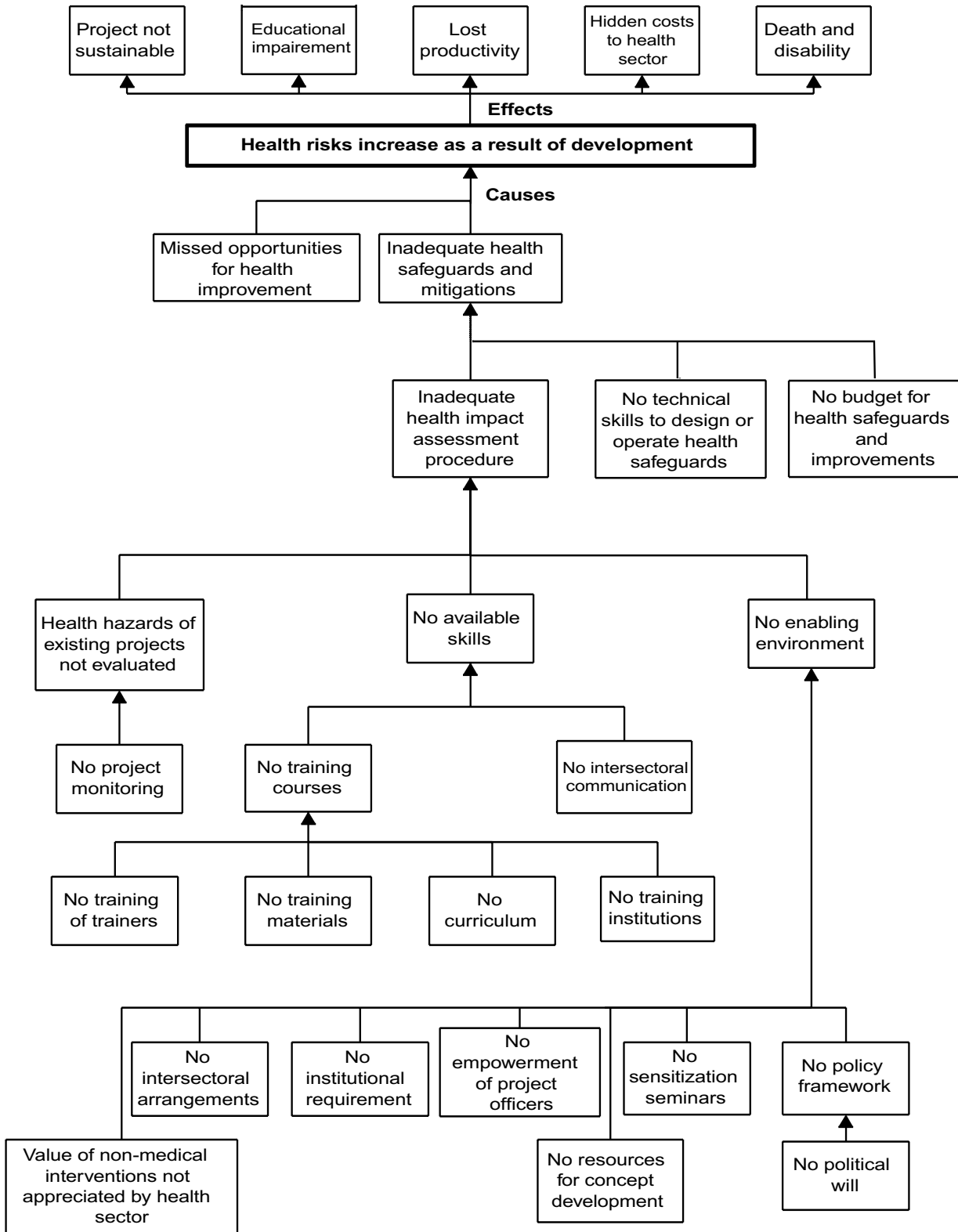
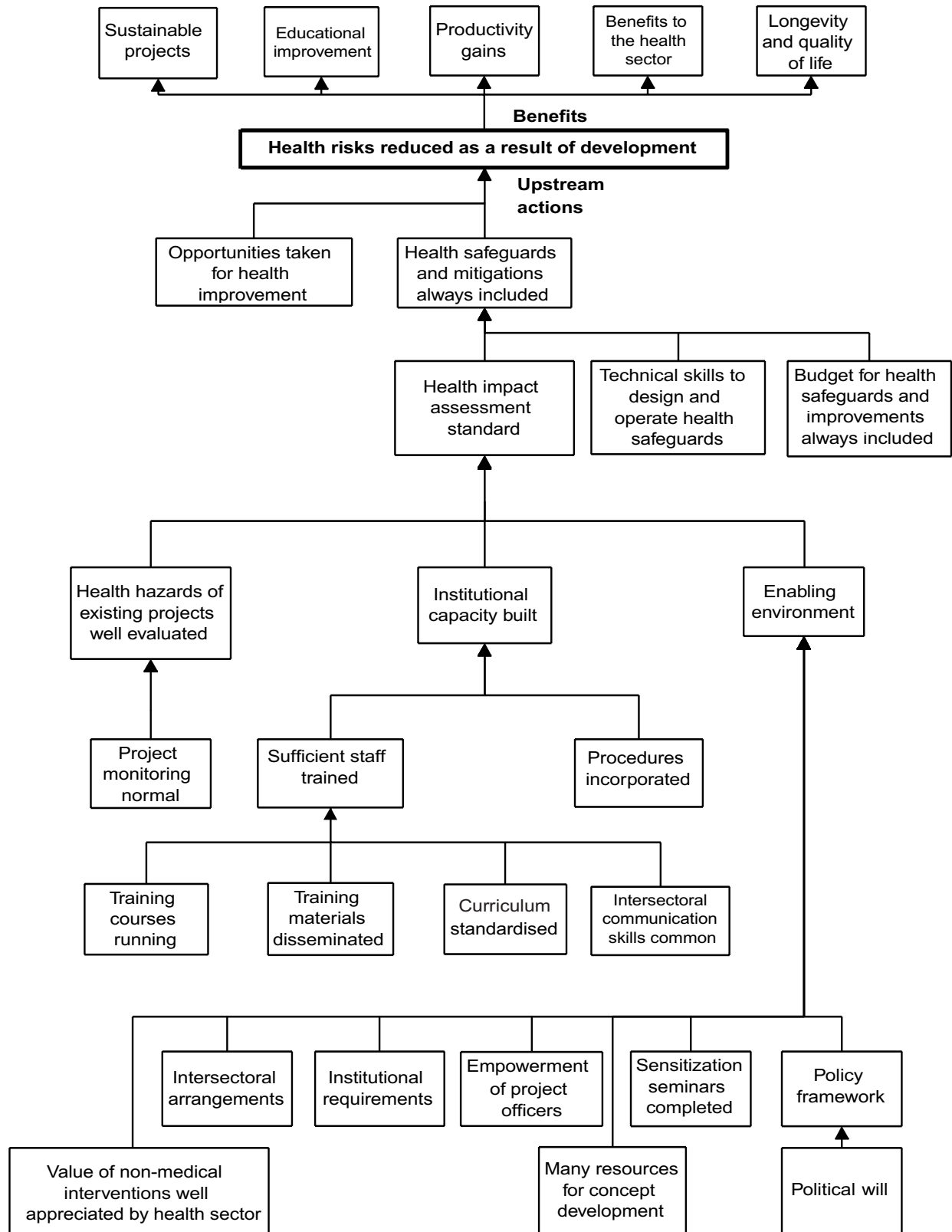


Figure 6.2. Solution tree - with health impact assessment



The development planning framework

Key players in development planning

Identifying the right resource persons

Finetuning materials

There are other factors that contribute to the unsatisfactory way health is dealt with in the context of development. One is the absence of specific policy frameworks for HIA and of a more general enabling policy environment to promote intersectoral collaboration. There is insufficient capacity in most ministries of health to respond adequately to HIA-related requests from other sectors. Ministries of health also frequently lack the capability to appraise an HIA report in a meaningful way.

It should be pointed out that, while the course by itself will contribute importantly to addressing the capacity building needs for HIA, **its effect will be synergistically enhanced** if the other, above-mentioned capacity building needs are addressed simultaneously.

6.3 Identifying course components

Many people in different ministries are involved in detailed steps of the development planning process, but very few have a complete overview of the structure and workings of the overall planning framework. It is important for the organizer of this course to obtain this overview, for a number of reasons as explained below:

The overview will facilitate the early identification of key players in the development planning process. Without a comprehensive insight into this process, it is quite likely that ministries with a critical role on the health/development interface are overlooked. As a result, no nominations will be invited from such ministries, their staff will not be among the participants, and the course will be handicapped in its methodology for lack of realism. For example, during one of the pilot courses in Africa, it became apparent that a lot of development planning takes place under the district development focus. The responsible Ministry, Community Development and Women's Affairs, was, however, not represented at the course. Preparatory work for the pilot course in India revealed that resettlement of communities, imposed by development projects, is the responsibility of the Department of Revenue. Had preparations been less thorough, this Department would no doubt have been overlooked and would not have been represented at the course. This insight will also put the organizer in touch with potential resource persons for the course, particularly for Task 1, which deals with the construction of a framework for comprehensive development planning.

Identifying the right local resource persons for this course can be a challenge. They need to be experienced professionals in their own field, but they also have to be accustomed to looking beyond their sectoral horizon. The most successful recruitment of a resource person for Task 1 occurred during the Central American pilot course, when the retired head of the Ministry of Planning of Honduras was found willing and available to participate. He was identified in the process of analysing the planning framework of that country.

Insight into the development planning framework will also make it possible to adapt the generic training materials to country-specific idiosyncrasies of the planning process.

In their generic form, the Task Guides try to cover the planning procedures of development by taking a common denominator approach. Most countries follow the project cycle concept in development planning. In most countries, Environmental Assessment has been integrated into the planning procedures from the earliest stages. HIA fits quite easily into this model. In the decreasing number of countries with centrally planned economies, this model does not apply. Where development decision-making has been de-centralized to the provincial or district level, the course materials will need to be adapted (see Section 5.3). Similarly, where Environmental Assessment legislation and procedures have not been firmly established, the materials will need to be modified.

Criteria for selection of relevant development projects

Based on a detailed understanding of the development planning framework, the organizer will be able to take into account national priorities and developmental relevance in the selection of projects that serve as the context for the tasks in the course.

Many governments have established development priorities from a macro-economic perspective. For example, a country without fossil fuel resources, plenty of water resources and an increasing energy demand will let dam construction for hydropower generation prevail over irrigation development. Where food security of a large rural population is at stake in the presence of a small and relatively wealthy urban population, the government will let agricultural development prevail over industrialization. Such priorities need to be a clear criterion in the selection of projects for use in the course. A proper analysis of development policies will bring them to light.

Make friends and influence people

In every ministry, there will be staff that share the concern over health impacts of development in an implicit or explicit way. They are the people that have the capacity to “think out of the box”. They need to be identified and cultivated, because they are important allies in ministries that normally would not consider health as befitting their remit. Those who are in a position to influence decision making about their ministry’s participation in the course will require particular attention. The course organizer may want to take the initiative to invite such individuals from different ministries to an informal brainstorming session. This will generate new ideas and re-enforce their commitment. In the end, they may become designated focal points to play an active role in the detailed preparations for the course. This will include nominations, confirmation and release of staff, as well as action to be taken after each course.

Build on positive forces

In all development sectors, there will be those who feel that health is the exclusive responsibility of the Ministry of Health. Similar feelings may exist among Ministry of Health staff, though perhaps for different reasons. Staff in the environment sector may feel that a distinct focus on HIA signifies encroachment of the health sector on their sometimes more conservation-oriented objectives in Environmental Assessment.

*Strategic health/
environment alliance is
fundamental*

The course organizer would be ill-advised to engage in rear-guard conflicts with such elements. The climate in health ministries and environment ministries is likely to be relatively more favourable. Moreover, they are the two critical ministries when it comes to representation in the course. Less favourable climates in other ministries will have to be assessed for the liability they represent to the success of the course. Some ministries may not be ready for this concept or for the proposed learning approaches. In such cases, it is better to exclude them and let the course first build its own reputation, so that for future courses these ministries may themselves request to be included. Experience with the pilot courses has shown that interactions in the task groups will correct the negative attitude with which some individual participants come to the course. This can turn into a tense and emotional experience, and tutors need to be prepared for such events through their induction.

6.4 Establishing formal arrangements

*Putting in place a
Steering Committee*

An important first practical step towards the organisation of any course of this kind will be the establishment of a Steering Committee. In principle, each of the participating ministries should be represented in the Committee. This formal liaison between the course organizer and various ministries will serve for partners to act in a coordinated way on jointly made decisions, e.g. on the type and seniority of participants, on the composition of the group of local resource persons and on how to provide follow-up support for the participants after the course.

Functions

Through their representation in the Steering Committee ministries are kept informed of progress in course preparation, of the achievements of the course and of any developments occurring in the wake of a course. A (semi)-permanent Committee can also agree on a series of courses, to ensure that skills in intersectoral negotiation and decision making are acquired by new cohorts of ministerial officials. The Committee may consider and decide on the desirability of inviting representatives of relevant sponsoring, funding or technical cooperation agencies to join its membership.

*Ensure timely receipt of
nominations*

During the preparatory phase, a main function of members of the Steering Committee is to ensure that nominations from all ministries are received before the indicated deadline. The Committee will agree on criteria (see page 45) and use these to select course participants from among the nominees.

A sense of ownership

Discussions and joint activities in support of course preparations will lead to **a sense of course ownership by the participating ministries**. They will also foster **an informed climate of opinion in favour of intersectoral collaboration**.

6.5 Resources in support of the course

Budgeting

The course has been designed on the principle that it can be organized with the exclusive use of local resources. There is no need to fly in international experts, and the course does not rely on sophisticated equipment or materials.

In order to get the course established, a transparent budget will need to be prepared. In order to cover all essential components, the following budget lines are proposed:

- Preparatory expenditures
- Conference facilities, including a plenary room, tutorial rooms, audiovisual equipment, use of the library facilities, a secretariat room
- Materials and equipment: training materials and books, calculators, stationary, equipment that may be used during the field trips
- Secretarial services and communications
- Salaries for course staff
- Accommodation and full board for participants and course staff
- Local transport for participants, tutors, resource persons and course staff to and from the course venue
- Daily subsistence allowance (per diem) for
 - 25 participants (18 days)
 - 5 tutors (20 days)
 - 6 local resource persons (average 4 days each)
- Honoraria
 - 5 tutors (20 days)
 - 6 local resource persons (average 4 days each)
- Field visits: pre-visits, actual visits, transport, refreshments, allowances
- Expenditures linked to opening and closing ceremonies, including preparation of certificates
- Organization of social events (tentative)
- Contingency funds (5-10% of total)

Sources of funding

Sustainability of the training course is best guaranteed if full cost recovery is achieved through tuition fees. This should be a long-term goal, but it is not realistic to consider it in the start-up phase. It is, therefore, important to invest in simple but effective (not necessarily glossy) promotion and information materials. These can be used to approach bilateral agencies, which are represented in many local embassies. Development assistance agencies of industrialized countries have been decentralized and decisions about granting financial support to development efforts are now frequently made at the embassy level. Not all bilateral agencies operate in all countries and each one has its own priority areas of interest. The organizer should invest time in profiling bilateral agencies in the country, and identify the ones with an interest in environment-health associations in the context of development, in capacity building and in impact assessment.

Ministerial clearance

An institutional affiliation with a well-regarded national training institution will prove beneficial when seeking financial support. Correct channels for

submitting the course proposal to bilateral agencies will need to be investigated. In some countries, ministerial clearance may be required before a proposal can be submitted to an external support agency.

National sources

The organizer should also explore national resources that may be tapped once the start-up phase is over and bilateral support is gradually phased out. Usually, ministries have a budget for human resources development, and it is useful to find out the criteria that apply. Other questions include:

Other questions

- Is there a centralized fund for the development of the civil service?
- Are there NGOs operating in the country that would be interested in becoming a partner in the organization of this course and provide partial support?
- Can private sector sponsorship be arranged and on what conditions?

Set up a trust fund

Whatever the opportunities may be, it is a good idea to set up a trust fund for the course during the start-up phase. Cash flow problems can easily arise and jeopardize continuity. The use of a trust fund on a revolving basis will, to some extent, hedge against such risks.

6.6 Specific preparations

An institutional framework has been created. Resources have been mobilized to hold the course. Next, a number of steps need to be taken as part of the detailed course preparations. It is recommended that, in the start-up phase, these preparations take place over a period of at least five months. There may be major delays in obtaining clearance and nomination from ministries. The formal response to the invitations may be slow, and identifying and scheduling the resource persons may take time. Once the organization of the course has become more routine, the length of the preparatory phase may be reduced.

Terms of reference for organiser

It may be that the course proponent and organizer are the same person. In that case, the proponent/organizer can follow the guidance on specific preparations given below. If the organization of the course is outsourced, sufficiently detailed terms of reference must be prepared and attached to the contract, to ensure all necessary functions are carried out. It is virtually impossible for one person to take care of all preparations. A minimum set-up would require one technical, one administrative and one secretarial member of staff to support the course from the first preparations until two weeks after its completion. Specialist training institutions will normally have their own support staff.

Key activities

The key activities at this stage are presented in chronological order below:

- Identification of a venue.
- Selection of participants.
- Recruitment of local resource persons.
- Recruitment of tutors.
- Preparation of field trips.
- Collection of documents.

Venue selection criteria

6.6.1. Identification of a venue

The course venue should meet the following criteria:

- Sufficient isolation from pressures arising from personal and professional obligations.
- Good meeting facilities, including a large meeting room, with flexible seating arrangements, that fits about 30 people comfortably for the plenary sessions.
- Facilities for the task groups to work quietly. Tutorial rooms are one possibility, but in many tropical countries, an open air space where the groups can retreat on a gallery, on a veranda or under a tree may be preferred.
- Office space for the temporary course secretariat.
- Library space for the temporary library.
- Rooms where the resource persons can do their own work until their services are requested by one or more groups.
- The institute should be able to provide basic materials such as flip chart frames, an overhead projector, a slide projector, television and video equipment, computers, printers, a photocopier and possibly a beamer.
- There should be basic but clean and comfortable lodging facilities for the participants and the course staff.
- Food hygiene should be of good standard, and variation in the menu is important, as the course runs over a three-week period.
- IT facilities for use by participants are desirable but are not yet universally available.

Materials needed

The course organizer should provide materials such as paper and pens for writing and flipcharts, overhead transparencies, floppy disks, and calculators.

Recreational facilities

Recreational facilities are an important aspect to look for in the selection of a venue. Experience has shown that, once participants become enthusiastically involved in their tasks, they will be inclined towards continuing their group work in the evening hours after dinner. Because of its length and intensity, this course demands access for its participants to acceptable levels of recreation. The nature of this recreation is very much culturally determined. In some cases, a television and video equipment will suffice. In some of the pilot courses, there was a focus on card and board games. At the end of the pilot course in Honduras, the participants unanimously noted in their final evaluation the lack of sports facilities.

In some countries, a choice may present itself between holding the course at a training institute or at a hotel. The pilot course in Ghana was held at the Volta Hotel, near the Akosombo Dam. The other candidate venues were considered too close to the capital city, Accra. A venue far from a capital city effectively prevents participants from returning to their offices and homes during the course. While the course in Ghana was successful in achieving its goals, the experience brought to light two major drawbacks of using a hotel as the venue: the incremental costs and the fact that meeting facilities in a hotel are often less suitable for this type of training course.

Flexible configuration of main course room

As participants spend a lot of time in plenary sessions for a number of different functions, flexibility in the configuration of the main course room is an important criterion in the selection of a venue. A standard meeting room with fixed theatre or horseshoe seating arrangements is not suitable. Most professional training institutes will provide rooms with flexible arrangements and tables that can be arranged in rows, in a horseshoe configuration or in small units. The small units are the preferred standard arrangement for plenary sessions: participants are seated with the members of their own group. This flexibility is an important feature to check when visiting a candidate venue.

Temporary library

Finally, there should be a library space where the collection of course documents can be housed. The local librarian may be asked to take care of giving out books on loan to participants. The limited availability of documents will put real-life constraints on the research that participants want to do as part of their tasks. In the absence of a library, the organizers will have to improvise and one of the course staff (most likely the reserve tutor, see Section 6.6.4) will perform the role of librarian.

IT facilities

Computer literacy among members of the course target audience is generally high and will further increase over the coming years. Not all training institutes will be able to provide IT facilities to accommodate all participants individually (moreover, this would not be desirable for a course based on task-oriented group work), but many will be able to offer adequate access to computer equipment for the four or five groups in the course.

Groups will want to prepare their task reports as electronic files and print them out for formal submission. Tutors should monitor that time spent on form is not at the expense of time spent on substance. More importantly, group members may want to access the internet in search for relevant information to complete their task work. This potentially reduces the role of local resource persons, although they, in turn, may assist groups in finding their way to relevant web sites. Information technology will further develop in great strides. Course organizers will have to follow these developments and identify benefits and constraints for a course that is basically about improved information sharing between humans.

6.6.2. When and how to select participants

When to select participants

The various ministries, departments, and other local agencies that will benefit from the course were identified when course preparations started. Participants will be selected from among the mid-level managers of these institutions. The initial course announcement and invitation will be addressed to their line managers or directors. The institutions will be asked to nominate a number of candidates for the course and submit their CVs to the course organizers. This should take place not later than four months prior to the planned course (see Table 6.1). The course organizers and members of the Steering Committee will make a final selection based on agreed criteria. They recommend to whom a formal invitation should be sent. A shortlist of reserve participants is also prepared for any last minute cancellations. In the preparations for the pilot courses staff members of country offices of WHO and FAO were co-opted on to the Steering Committee for this function.

Table 6.1. Planning schedule for selection of participants

	Time	Action
Before the course starts	5-4 months	Identification of relevant ministries and departments to receive course announcement and request to nominate candidates for the course
	4 months	Nominations of candidates by ministries and departments
	3 months	Selection of candidates and reserves by the Steering Committee
	2 months	Formal invitation and course details sent to selected participants
	2-1 months	Participants confirm their attendance
During the course	Day 1 - 18	Course implementation; participants are present throughout
After the course	2 months	Final Course Report sent to participants, ministries and departments

Who should be selected as participant?

The profile of an acceptable participant should include solid professional training and experience, and active engagement in relevant work such as policy-making, development planning and programme implementation. The participant should also still have at least another 5-10 years of career perspectives. At a personal level, desirable features include a strong interest in working with professionals from different backgrounds. Participants should be assertive and good communicators. In order to secure a proper gender balance in the course the organizers should promote nominations of qualified female candidates.

Content of letter inviting nominations

Letter of invitation to nominate participants

The letter of invitation to nominate the participants should refer to:

- Objectives, scope, expected outputs and tentative programme of the course.
- Role of the Steering Committee and ministries represented in it.
- Timetable of the course with a tentative starting date.
- Summary of the learning methods used in the course.
- Rationale for the need for each task group in the course to include an official from every relevant ministry.
- Number and profile of participants.
- The need to submit for each nominee a full *Curriculum Vitae*, emphasising the desirability of a balanced representation of each ministry’s mid-level staff according to experience, qualifications, interest and gender.
- The absolute need for all participants to attend the course throughout and without pressures or distractions from their parent ministry.
- A possible financial contribution from the Ministry for their participants towards the costs of lodging and board, transport during the course, local *per diem*, and reimbursement of travel expenses to and from the course (recognising that the release of the staff member also represents an opportunity cost).
- A deadline by which the nominations should be received.

Some of the above information, including the venue of the course, may be contained in a course brochure that will be enclosed with the letter requesting nominations.

Letter of invitation to participants

In this respect the course may differ from normal practice for other courses, as the participants come from different ministries and are sent at the instruction of their ministry.

Communication with the participants

The letter of invitation to individual participants will need to explain:

- The dates, location, and all logistics and financial arrangements for the course;
- The aims and special conduct of the course.
- The importance of active participation throughout the course.
- The need to return a confirmation of attendance by a set date.

Participants need to feel well-prepared.

Again, some of the above information may be contained in an enclosed course brochure.

The letter of invitation may refer to the fact that the nominee's participation is in the capacity of "a valued colleague". This will help create from the very outset the special environment which is essential for the success of the course.

Once confirmations have been received, a follow-up letter will provide further logistical details (venue and how to get there, possible transport arrangements). In this letter, the participants will also be asked to collect information on development planning procedures in their sector/ministry in preparation for Task 1.

Important restrictions

Clearly, definitive arrangements for the course cannot proceed unless the budget is fully secured from non-government and/or government sources. Also, this is not the type of course where an individual can apply and be accepted without forming part of the group of participants nominated by her/his ministry. Even individuals wishing to attend as observers would be disruptive to the learning process.

Who to recruit as resource persons

6.6.3. How to recruit local resource persons

The qualifications of the local resource persons will vary according to the context in which the course is run. The context of the pilot courses was water resource development and health in tropical countries. Local resource persons, therefore, included:

- A planning specialist (Task 1)
- An ecologist (Tasks 2, 3 and 4)
- An engineer (Tasks 3 and 4)
- An agricultural scientist (Tasks 2, 3 and 4)
- A health systems specialist (Task 6)

all with personal knowledge of local conditions and regulations.

When the resource persons are needed

The content of each of the Task Guides indicates when and what type of expertise will be needed by the groups. A list of resource persons with their respective schedule of work should be prepared three to four months prior to the course (see Part III). The initial contact with resource persons is established at about the same time (see Table 2). With their formal invitation, the resource persons should receive a copy of the "Resource Person's

Guide”, which has details about the course concept and content (see Part III). In the letter of invitation they must be informed of the precise dates when they are expected to be available. They should be made aware of the fact that, on those dates, they are expected to be available throughout the working day. Their appointment, the timetable arrangements, and details concerning their honorarium and *per diem* entitlements must subsequently be confirmed in a formal letter from the organizers.

Table 6.2. Planning schedule for recruitment of local resource persons

	<i>Time</i>	<i>Action</i>
<i>Before the course starts</i>	<i>3-4 months</i>	<i>Identification of relevant resource persons</i>
	<i>3 months</i>	<i>Invitations and Guide sent to resource persons</i>
	<i>2 months</i>	<i>Resource persons accept their invitation</i>
	<i>1 month</i>	<i>Resource persons receive written confirmation of their participation and logistical instructions</i>
<i>During the course</i>	<i>Day 1 - 18</i>	<i>Individual resource persons arrive in good time for discussion of their roles</i>
<i>After the course</i>	<i>1 month</i>	<i>Letter of thanks sent by the course organisers</i>

What is the role of the resource person?

In the Guide, it is strongly emphasized that the resource person is not expected to give lectures in her/his field of expertise but rather act as a consultant to groups that request assistance with issues/problems/questions that they have not been able to resolve. In accordance with this consultancy role, the resource person should also provide information and guidance as appropriate during the daily plenary sessions. Following the presentations of each group’s task report the resource person will offer additional or corrective information or guidance (not a lecture) to the group and the plenary audience.

Local resource persons are also asked to appraise the written task reports and provide feedback to the groups. Their appraisal will be used in the final course evaluation.

Briefing

Local resource persons are expected to familiarize themselves with the Task Guides and background materials. Their early arrival will allow the course organizer to brief them. It is important to explain in advance (and remind them at the briefing) that they will be needed only intermittently during the day or days of their participation. It is advisable for the resource persons to bring work of their own, so that they can avoid wasting uncommitted time; for that reason it is desirable to provide dedicated office space for the resource persons at the course venue.

Towards the end of their participation, the resource persons will be asked to contribute to the evaluation of the acceptability, effectiveness and efficiency of the course from the perspective of their own role (see Chapter 8).

Profile of resource persons

The profile of the ideal local resource person should include the following features:

- A subject expert with practical experience related to one or more of the tasks.
- Sufficiently senior to be acceptable to the participants.
- Sufficiently flexible to feel comfortable in the role of consultant instead of lecturer.
- Available when needed during the assigned period.

The number of resource persons to be recruited will depend on the number of topics within each task. The pilot courses employed between one and three per Task.

6.6.4. How to recruit non-expert tutors

When to recruit tutors

About three months before course implementation, an announcement and invitation should be sent to institutions that may be potential sources of “non-expert” tutors (see Table 6.3). This could be, for example, a university department that looks for opportunities for young staff to be exposed to novel learning approaches. Certain entities in the government structure or non-governmental institutions may also be potential sources of tutors. The latter may be interested in releasing junior staff if they can see the benefits for their institution in the longer term. The Tutor’s Guide (see Part III) should be given in advance to proposed tutors. It describes all aspects of the work expected from them, including a description of the content of a two-day induction for tutors immediately prior to the course. The potential tutors should be made aware that they will be expected to be available full-time during the entire course and for the two induction days. One month prior to the course, a letter is sent by the course organizers to the selected tutors (with a copy to their supervisor/employer) confirming their participation.

It is advisable to ensure that the initial inquiry about their availability and willingness to participate contains adequate information concerning the aims and conduct of the course, dates, venue, *per diem* entitlements, honorarium, and expected duties. These data will help them to make an informed decision about whether or not to agree to participate.

Table 6.3. Planning schedule for recruitment of tutors

	Time	Action
Before the course starts	3 months	Call sent out for submission of tutor candidates
	2 months	Proposed tutors accept their invitation, joint selection of tutors by the Steering Committee
	1 month	Selected tutors receive written confirmation of their participation
	2 days	Tutors are inducted
During the course	Day 1-18	Tutors accompany groups during tasks 1-5; carry out their own assignment during task 6
After the course	1 month	Letter of thanks sent by the course organisers

Who should be recruited as tutors?

The number of tutors to be recruited for each course will depend on the total number of participant groups. There should be one tutor per group plus one reserve. The reserve will be needed in case one of the other tutors drops out for whatever reason and should be available as stand-in at short notice. While on stand-by, the reserve tutor can be given other assignments as part of the team.

In order to act as a facilitator supporting the work of a group the tutor must have the following characteristics:

- Not an expert in any major aspect of any of the tasks.
- Junior or equal to the participants in career status.
- Sufficiently mature and well-educated to be acceptable to the group.
- A good communicator, open and not shy.
- A sensitive, well-organized leader who can provide enthusiasm and gentle direction for a group of professionals from different sectors.

A final selection of tutors will be made jointly by the course organizer and Steering Committee, in consultation with the supervisor/employer, based on the above criteria.

What are the roles of the tutors?

The tutors will be made familiar with the overall aim of the course, the problem-based learning approach and the detailed content of the Task Guides. This will be achieved through their participation in a two-day induction, described in detail in Chapter 7.

Each tutor will be assigned permanently to one group. The tutor will assist his/her group in working through the sequence of tasks within a defined period of time. It must be stressed that the tutors should not provide subject-specific information to the group members (this is the role of local resource persons).

Throughout the course, the tutors will use their familiarity with each Task Guide and the overall aims of the course to:

- Foster group bonding and collaboration within the group.
- Help their group to plan and organize its work.
- Encourage open discussion related to each task.
- Promote alternative ways of arriving at a consensus.
- Resolve any conflict within the group.
- Deal with unhelpful behaviour.
- Act as a link between the group and the resource persons and the course organizers.
- Support inter-group competition.
- Discuss each day's work with the course "anchor person" (see Chapter 7).
- Contribute to the evaluation of the acceptability, effectiveness and efficiency of the course from the perspective of her/his own role.

Link between field trips and tasks

6.6.5. Preparation of field trips

The course programme foresees two one-day field visits. The first coincides with Task 2, on rapid health impact assessment, and aims to allow participants to make direct observations in an area where a planned devel-

opment project will be implemented. The second field visit coincides with Task 6, the formulation of an intersectoral action plan for health protection and promotion. This visit to a fully operational development project allows participants to learn about its health impact, observe missed opportunities for the incorporation of health safeguards in its design and operation and learn about the community's coping mechanisms.

In the preparations leading up to the course, selection of field trip locations is the main challenge. The organizer will want to visit a number of short-listed locations to verify whether they meet the criteria.

Criteria for selection of field visit sites

A number of generic criteria apply in the selection of sites for the field visit:

- The site must be accessible within a day's trip.
- There must be development staff on the spot, especially on the site of the first trip.
- The development projects visited must be of the same category as the project the groups use as the context for their tasks (ideally, the project visited in the first field trip **is** the one that serves as the context).
- Local authorities must give their informed consent to the field visits.
- The risks involved in these field trips must be properly assessed and reasonable.

The detailed local arrangements are best made during the course, a couple of days before the trip is scheduled to take place (see Part III).

6.6.6. Collecting documents

Abundant documentation is a pre-requisite for this course. The two main sources of written information available to the participants are the documents they receive on registration and the documents that are made available to them through the temporary library.

On registration

The documentation the participants of the five pilot courses received on registration included a number of relevant textbooks and some of the important national policy documents covering development, environment and health. This not only made it possible for each individual participant to read information of interest whenever he/she wanted to (rather than waiting for a book to be available in the library), but it also provided each participant with his/her own private collection of resource books for future reference. This component obviously adds to the cost of the course and will have to be reflected in the tuition fee. If this model is followed, it is important to indicate in the letter requesting nominations that a package of textbooks will be part of the materials for each participant. A list of the textbooks provided in the pilot courses is presented in Part III.

The course library

The course organizer should gradually build a collection of relevant documents and textbooks that will be made available to all participants in a temporary library. Such a collection will have to be updated regularly. It is also important to have more than one copy of some of the key textbooks, to facilitate access by the participants. A list of the textbooks that were available in the temporary library of the pilot courses is included in Part III.

6.7 Final preparations

A week before the start of the course, final preparations will become a full-time occupation of the organizer and his/her team.

Confirmation of attendance

The list of participants will be complete, but some participants may not have responded to the invitation. They or their supervisors in the ministry need to be contacted. In ministries where decentralization has been part of public sector reform, contacting participants who come from remote areas may complicate matters. In these cases, confirmation of attendance must be received no later than two weeks before the starting date of the course, to allow time for arrangements for alternative participants, should the originally selected ones drop out.

Need for final adjustments

Very important at this stage is the issue of maintaining a proper sectoral and gender balance. There are several good reasons why ministries may withdraw staff whom they initially nominated. There may be a sudden crisis at hand and presence of the person in question may be crucially important in the ministry's response. Illness among colleagues may result in unexpected understaffing of a department. There may also be personal reasons (illness, family circumstances) preventing a participant to attend. At the time of inviting nominations for the course, it should have been made clear to the ministry in question that the success of this course crucially depends on an equal participation of all relevant sectors. It may be necessary to bring this point once more to the attention of the ministry's human resources officer. At this stage, sectoral balance is more important than gender balance, but whenever a nominated and invited woman professional is withdrawn, an effort should be made to replace her with another woman. In ministries where professional staff is male dominated, this, however, may not be a feasible option.

Allocation of participants to groups

On the eve of the course, the definitive number of participants and composition of the group will be clear, and the course organizers can then make final adjustments to the arrangements.

The course organizer will allocate participants to small groups of between five and eight persons for the duration of the course. In the case of a regional course this distribution of participants will be by nationality or State.

The aim is to achieve a productive mixture of expertise from different ministries, as well as an acceptable gender balance. As there will be several participants from each ministry, optimal complementarity should be aimed for in the allocation process.

Delays in arrival should be taken into account, particularly for participants coming from remote areas, but any participant arriving after day 2 of the course (when Task 1 is completed) should be categorically refused access. Bringing in participants at that stage usually requires re-arrangement of the groups and disrupts the group bonding process.

7 How to run a course

7.1 The anchor: concept and functions

Anchor: role and characteristics

The pivotal person in this course is the anchor man/woman – in short: the anchor. As the name indicates he/she provides the steady point around which the course revolves. The anchor combines the functions of general facilitator, coordinator and overall leader. The anchor liaises with the resource persons, inducts and de-briefs the tutors, prepares the daily programme update and facilitates the plenary sessions. In many instances, the organizer and the anchor will be one and the same person.

The anchor's position requires a person who knows the course in every detail, who has a multidisciplinary background and the capacity to look at issues from different (sectoral) perspectives. He/she should also have good skills in communicating and in interacting with people of all levels and backgrounds and the subtle authority that comes with natural leadership. The variety of responsibilities and activities is reflected in the schedule on page 54.

7.2 Induction of tutors

Purpose of induction

Two days prior to the start of the course, the tutors are invited to attend a number of induction sessions. These sessions are coordinated and facilitated by the anchor. The purpose of this induction is to familiarize the tutors with the learning approach and the course materials, and to convey to them a number of techniques of practical use in facilitating the group process. The induction sessions should be informal.

The anchor starts with an explanation of the course methodology. At the end of the series of pilot courses, it was clear that tutors who had completed their education recently had greater affinity with the problem-based learning approach. The tutors are given their copies of the Task Guides and are asked to go through them as the participants would in their groups. At the end of each page, the tutors discuss the issue and initially come up with technical questions. The anchor should slowly introduce ideas relating to the group process for discussion by the tutors. Issues in the Task Guides that are perceived as ambiguous are also discussed and tutors make notes about them in their copies.

Tutors' facilitation roles

In the afternoon of the first day, the tutors will go through Task Guide 2 in an accelerated fashion. This is the moment to introduce them to some group management techniques, such as the Nominal Group Process (Delbecq et al., 1975)⁴. Other facilitation roles of the tutor are also highlighted:

4) Delbecq, A., van der Ven, A.M. and Gustafson, D.H., 1975. *Group process for program planning: a guide to nominal group and Delphi processes*. Glenview, Illinois: Scott Foreman

A typical day in the life of the anchor during the course

- 07:00
- Finalize the programme update for the day and arrange for its reproduction.
 - Check whether all documents needed for that day are available in sufficient numbers.
 - Check whether the resource person(s) that were scheduled to arrive the previous evening indeed have registered and contact them to set up an appointment for their briefing.
 - Look into any administrative issues that may be pending.
- 07:30
- Breakfast of participants and staff (N.B. *it is important that participants and staff have their meals together: quality of staff-participant relations was significantly less in pilot courses where they were separated at mealtimes*).
- 08:15
- Final word with the tutors about the programme of the day.
 - Check the plenary session room to ensure that the configuration is as required for the function of today's session.
- 08:30
- Plenary session starts (*it is important from the very start to ensure punctuality and maintain this during the course*).
 - Introduction of today's programme, distribution of course materials for today's task.
 - Introduction of newly arrived resource persons.
 - Open discussions on difficulties encountered in yesterday's group work.
 - Question and answer on aspects of the materials presented.
- 09:15
- Groups start their group work; anchor meets with newly arrived resource person for detailed briefing.
- 09:45
- Anchor meets with administrator concerning the final logistical preparations for the next day's field trip.
- 10:30
- Coffee break for participants, all course staff join in.
- 10:50
- Groups resume their work; anchor makes a round to get a feel how groups are doing.
- 11:30
- Final discussions with the resource persons who assisted in preparing the programme of, and arranging for, the field trip; preparation of copies of the programme for the next day's field trip.
- 12:30
- Lunch for participants and staff.
- 14:00
- Plenary session; stock taking of progress of individual groups; questions and answers on task-related issues the groups addressed in the morning.
 - Briefing on the next day's field trip: objectives, programme, logistical arrangements and recommendations on clothing, (e.g. sun caps and type of shoes).
- 14:45
- Groups resume their work.
 - Anchor establishes contact with senior officials to confirm their attendance at the plenary session next week, when the groups will present their task reports.
 - Discussion with the resource person about the marking of the task reports that will be handed in by the groups the day after tomorrow.
- 15:30
- Coffee break for participants, all course staff joins in.
- 15:50
- Groups resume their work; anchor makes a round to get a feel how groups are doing.
- 17:30
- Group work stops in accordance with programme (groups or individuals are free to continue to work without the benefit of their tutors).
 - Half hour debriefing session of the anchor with the tutors, to review the events of the day and discuss problems and solutions.
- 19:30
- Dinner for participants and staff.

The challenges the anchor faces as the course proceeds are to avoid emotional attachment, maintain high standards, treat personal problems with empathy rather than sympathy and keep the course staff working in a product-oriented way.

- Assisting the group in time management.
- Reminding the group members of the library and resource persons.
- Suggesting a division of labour within the group.
- Switching between different modes of working (round table discussions versus having one member of the group write items on a flipchart).
- Ensuring that the group is not dominated by one or two participants or, on the contrary, that there are no participants who play no role at all.
- Crisis management.
- Acting as liaison between their group, the course team and the anchor.
- Arranging access to local resource persons.

The second day of the induction

The second day of the induction starts with a recapitulation of issues, and questions and answers for the tutors. Then the remaining Task Guides are covered in a rapid fashion, pointing out moments where the groups may need special support. The tutors are also informed that groups will carry out Task 6, without their facilitation. Simultaneously, tutors will be assigned to consolidate the group outputs of Task 5.

Usually the induction is finished by lunchtime or early afternoon. The anchor must use the interactions during the induction sessions to make a final assessment of the capacities and weaknesses of each individual tutor and come to a decision about who will be held in reserve. If the assessment is correct, the person in question usually accepts the decision, as he or she will have drawn his/her own conclusions at the end of the induction.

Tutors' monitoring role

The tutors should also be briefed about their monitoring role through daily de-briefing sessions with the anchor. They should be introduced to other members of the organising team and to local resource persons, and must be made to feel as valuable members of the course team

7.3 Arrangements for the opening session

Registration

Participants of the course will arrive the day prior to the start of the programme. Proper arrangements should have been made to direct them to a registration desk, where they are enrolled, receive the course materials, and are directed to their room. They should also receive an invitation to the opening ceremony and should be orally informed of this in case they don't immediately read the materials they receive.

Please note

The Task Guides and the project documentation are distributed to the participants in accordance with the course programme and **not on the day of registration.**

Make it special from the start

It is recommended that any ceremonial opening of the course be held on the eve of the start of the programme. This will usually be the evening before the first working day of the week. While the presence of dignitaries at this function will certainly add glamour to the occasion and make participants feel that they are part of an important training event, too many dignitaries will kill the ceremony. To be avoided is a situation as occurred at the first in the series of pilot courses, when, following five lengthy opening statements by officials from national and international agencies, the

Minister of Health of Zimbabwe had to ask the audience to stand up and sit down again, lest they would fall asleep on him during his formal opening address.

Whatever form the official opening may take, it is preferable to separate it into a formal and an informal part. For the informal part, a suitable location should be selected (some training institutes, for example, have a small outside amphitheatre), where at around 16:00 (before it gets dark) participants, local resource persons present, tutors and other course staff gather and introduce themselves briefly (though more than just by name). This occasion can also be used to convey some of the “household” messages concerning mealtimes, laundry, medical and recreational facilities and options for communication with the family. As the ice is broken, the group is now ready for the formal opening, and the evening is ideally rounded off by a joint buffet or barbecue dinner.

7.4 Kicking off

Introduction by the anchor

The first day of the course sets the tone for a three-week period of intense and fruitful task work by the participants. From the very start, the participants should sit in their assigned groups with their tutor. The introduction by the anchor should briefly highlight key concepts. These include the methodology, punctuality, comradeship and the role(s) of the various course staff - resource persons, tutors, administrator and the anchor. The subject matter (for example, the health impact of water resources development projects) is best introduced by an illustrative video, to avoid a technical lecture that would conflict with the problem-based learning approach.

Following the video, time should be spent on an open question and answer session. Alternatively, a more guided discussion of a quasi-nominal group format could explore the knowledge and opinions of the group as a whole on the subject area that provides the context for the course. The coffee break provides an easy transition to the first task assignment.

All group members receive from their tutor a copy of the first Task Guide. The principles of the Task Guide, and the need to keep and manage time are briefly explained (the tutor can fill in the details once the groups have retired to their work place). With this, the actual task work has started and the course has taken off.

7.5 Initial problems with the methodology

What is learning ?

In spite of the fact that adults learn unwittingly on a daily basis through their experiences in solving problems and dilemmas, the task-oriented, problem-based learning approach may meet with adaptation problems at the start.

Most participants have a conventional concept of training that relates to passive transfer of information. They are now faced with a situation where they have to take individual initiative in a group with unfamiliar people. The idea that this can represent a learning process at first meets with

disbelief. The tutor will have to provide room in the group's first discussions to overcome this initial reaction, by letting participants express their misunderstandings, prejudices and insecurities. It will take the first couple of days to deal with wrong concepts. A common one concerns the role of the resource persons. During the first couple of days, most groups will resort to them in the expectation that they will receive a private lecture. The briefing of resource persons must emphasize that such requests are to be categorically refused. Groups will have to learn to formulate exact questions before they turn to a resource person. They will then receive concise and exact answers.

Information overload

Information overload is another problem at the start of the course. Participants have just met a large group of new people; they are introduced to an unfamiliar learning procedure. They have to do a lot of reading to familiarize themselves with the development project that provides the context for their task work, they have to make an effort in time management and they have to remember the information sources that are available to them. It has been the experience in the pilot courses that participants need repeated reminders of the presence of resource persons and the temporary library before they start to make efficient use of them.

Insecurity and intimidation

In a more private sense, the anchor and the tutors will have to be alert to initial problems of insecurity and intimidation. For instance, some participants may feel they cannot express their ideas in a group of people with different disciplinary and professional backgrounds. Some may suffer from anxiety. Some may be fathers/ mothers who are for the first time away from their young children for an extended period. Informal settings such as the coffee breaks or mealtimes provide suitable moments to reassure participants struggling with such personal emotions.

7.6 Interacting with the tutors

The tutors have a dual role in this course: they are the group facilitators and have been inducted to perform this function up until the start of Task 6. The tutor is also expected to look after his/her group socially, at meal times and during field visits. They also perform a bridge function between the participants and the course management. Participants should be encouraged from the very start to communicate with the management through their group tutor.

Daily de-briefing session with the anchor

From this dual-function perspective, it is important to make the tutors feel that they are part of the course management. This will provide a level of confidence that will benefit communications. The daily de-briefing session with the anchor is an important element in this process. The atmosphere should be kept informal, and the anchor should ensure refreshments are served after a hard day's work. There will be other occasions for interactions that strengthen the link between the tutors and the management, but care must be taken not to create the impression towards the participants that the tutors are "on the side" of management. This would destroy the basis for their relationship with the group. By the time the groups have finished Task 5 (the formulation of generic Terms of Reference for

Health Impact Assessment), the tutors will have gone through a bonding process among themselves. This will facilitate their final assignment (while the groups work independently on Task 6): the consolidation of the generic TOR produced by the groups into one product. The consolidated generic TOR are a valuable output of the course. At the end of the pilot courses, they were forwarded to the national authorities responsible for impact assessment for their consideration as tools in support of effective Health Impact Assessment.

Crisis management

Part of the role of tutors as facilitators is crisis management. This can be very demanding and may require backstopping support from the course management. The balance of power between group and tutor may also lead to abuse. Groups may use the tutor as a messenger, for getting refreshments or even for writing the report. Such situations need immediate correction. In extreme cases, where the relation between a tutor and his/her group has become untenable, the reserve tutor may be rotated in, while the original tutor may take responsibility for other functions such as management of the temporary library.

7.7 Course routine

On completing the first Task, the construction of a comprehensive development planning framework, participants will have

- Become reasonably familiar with the learning approach.
- Understood the context within which they are carrying out their tasks.
- A clearer picture of the objectives of the course.
- Assessed their role in the group, and the roles of the various personalities involved in the course.
- Overcome initial insecurities and inhibitions.

From introduction to routine

In several ways, the first Task is a stage-setting exercise, and the next Tasks will be more goal-oriented, directly and logically related to the planning procedures just discovered and familiar to the professional tasks addressed in people's everyday responsibilities. The difference is the overriding need for intersectoral dialogue to arrive at a consensus that addresses the concerns of all and still satisfies every participant's professional integrity.

From here on, the task work takes on a regular routine: a new Task is introduced, tutors hand out a letter of remit and the Task Guide, groups set to work, morning and afternoon plenary sessions are used to raise issues of common interest, groups produce a report and they present their findings at a concluding plenary session.

Letter of remit

Every effort should be made to create a realistic atmosphere within which groups carry out their tasks. The letter of remit plays an important role in this respect. It is a simulated letter originating from a national authority presenting the group with a problem, explaining a number of policy and/or procedural issues and requesting the group to carry out analytical work and report on its outcome by a given date. In various pilot courses, such letters were prepared on official ministerial stationary, but in some countries there were insurmountable sensitivities about this procedure. In a

perfect situation, an appropriate high level authority (for example a Director of Epidemiological Services in the Ministry of Health, or a Chair of the National Environmental Management Council) would agree to sign the letter of remit and attend the plenary session when groups present their Task report. This happened a couple of times in the pilot courses in Tanzania, Central America and India and proved to have a significant added value in terms of group motivation.

In the pilot course in India, the sense of realism went to the extent that groups submitted their reports with a cover letter in response to the letters of remit they had received !

Generic letters of remit for the tasks are included in Part III, and examples of the letters used in the pilot courses in Ghana and Tanzania can be found on the CD-ROM.

Distribution of labour

As groups get immersed in their tasks, time pressure and the level of challenge mount with each new Task and a certain level of competition between groups develops, there may be a tendency of groups wanting to continue their Task work in the after-dinner hours.

They then carry on in the absence of their tutor, at the risk of gaining speed at the expense of the quality of the learning experience. This should definitely be discouraged. As an alternative, tutors may propose to groups at the end of the working day to assign individual research and reading tasks to each member that will help accelerate progress in the group's task work the next day. This will allow groups to go more in-depth on certain subjects (this can be reflected in the final report !) and they also learn to appreciate the amplifier effect of individual efforts as inputs into the group work.

At the beginning of the second Task, group bonding will have started and the procedure of assigning work to members of the group will be less tense. It is advisable that in this process a balance is achieved between comparative strengths and advantages of individual group members and "type-casting", for example on the basis of gender. Particularly in groups with one female participant, the situation must be avoided that she is automatically assigned "secretarial" functions of note-taking and report writing. The tutor will have to play a vital role in guiding these issues along acceptable paths.

Presentations

The Task Guides recommend their users to make notes of the consensus position arrived at by the group on the various issues it needs to consider, thus, as it were, writing the report while completing the Task. In the final write up of the Task report, responses and positions may be further qualified and backed up by more detailed information collected as part of the Task work. Tutors and local resource persons may give groups further guidance on the length, scope and focus of their reports. The reports must be submitted on the indicated date; groups should not be allowed to build up a backlog of task reports. The local resource person associated with a specific Task will be asked to appraise the reports and provide feed-back to the groups.

... require a formal setting,

In addition to the submission of a report, groups are asked to prepare an oral presentation of their findings and conclusions during a special plenary session. It is recommended that this session be made more formal, by re-arranging the seating into an auditorium style, by having the local resource persons sit at a table on the podium (like an expert panel) and by inviting one or more senior officials, among them preferably the functionary who signed the letter of remit. The anchor should also run this session in a formal way. Proper functioning of equipment for presenting (overhead projector, flipcharts, beamer) should be tested before the session starts.

Groups will have six opportunities to present their findings during the course and again, rotation among participants in the group (or active participation by more than one group member in each presentation) should be encouraged.

... and allow for improvements in communications skills

Participants will be able to effectively apply the intersectoral negotiating skills developed during the course to their full potential only, if they improve their capacity to convey the outcome of the negotiations to their superiors. While this is not an overt course objective, the presentation of task reports offers an opportunity to bring to their attention key points that will help increase the impact of their report. A member of the course staff or a local resource person may be asked to appraise the presentations, using a number of criteria such as:

- Condensation to relevant points and key messages: the presentation should be a succinct and logical sequence of arguments without unnecessary details.
- Effective speaking: participants may require guidance on how to direct themselves to the audience, their body language, and their speed, intonation and the loudness of their voice.
- Projection of overhead transparencies: a transparency should contain a limited number of words and lines, and certainly not a full written page. Colours should be used judiciously.
- Projected material may serve as a prompt, but the presenter should face the audience and not the projection screen.
- Timing: the time allocated should be adhered to, and there should be time left for questions and discussion.

7.8 Field trips

Field trip purpose re-visited

As pointed out in Chapter 6, the focus of the first field visit is on conditions prior to the implementation of a project; it supports the screening and scoping tasks for an initial rapid Health Impact Assessment. The focus of the second visit is on conditions in an area where a project has been operational for some time, to illustrate missed opportunities, the need for maintenance and coping mechanisms of local communities; this supports the final Task of formulating an intersectoral action plan.

The success of the field visit depends on careful prior exploration of potential sites, close liaison with local officials and communities and a well-developed plan of activities prepared by the participants. The final logistical

organisation includes transport and catering, as well as some formal recognition for the contributions made by the local officials and communities. The participants need to be familiar with what to expect and what to do during visits.

Detailed preparations take place one or two days before each trip. Members of the course team visit the selected site with the following objectives:

Pre-visit to field site

- To remind the local leadership of the fact that a group of training course participants will visit the project area (to which they have given their consent).
- To identify representatives of different development authorities, of the health sector and of the community who can meet with the group.
- To survey the development area (things may have changed since the last visit) and identify locations that are particularly illustrative in the context of the task.
- To sort out the logistics, foresee any problems and assess possible risks involved in the trip.

Briefing

The objective of the trips is not just to give the participants a chance to observe a situation with their own eyes. The trip also serves to demonstrate that with proper preparation and well thought-out questions even a one-day trip can yield a wealth of information. Enough information, indeed, to provide a reasonably reliable evidence base that adds value to a screening/scoping exercise in preparation for rapid health impact assessment or to allow the rapid appraisal of the impacts of a development project that has reached a new steady state.

Before the field trips, a plenary briefing session is organized to present the objectives, programme, logistics and proposed way of working (see also the generic field trip programme in Part III). In short, on location the groups of participants will rotate to meet with various key informants and to make direct observations of specific environmental conditions and of local health facilities. They will have prepared a list of questions for each key informant (group) to ensure maximum benefit from 10-15 minute interviews. If time permits and it is socially acceptable, participants should also be encouraged to wander off in a local community by themselves, in a rapid rural appraisal fashion.

The pilot course in Ghana included a visit to a local community where the development of irrigated rice production was proposed. In the official meeting with the community leaders the appreciation of this project was very positive. On a stroll through the village, some course participants met a group of young males who had purposely not been invited to the official meeting and whose opinions painted a very different picture !

On the morning following the field trip, the plenary session should in part be dedicated to a reflection on observations made so that the different impressions are shared and validated into a collective experience.

To reinvigorate and to motivate

The final two tasks

Special products call for special arrangements

7.9 The debate

The debate will take place approximately halfway through the course. It anticipates a low in enthusiasm and energy that tends to occur during a lengthy and strenuous course. The rationale has been explained in Chapter 4.

The motion to be debated is “intersectoral collaboration is neither desirable nor practical”. The debate is intended to be light-hearted and enjoyable and to revive interest and energy. The participants are split into two groups and each elects three colleagues to speak on their behalf. These groups decide their arguments and the order in which the spokespersons will speak. A chairperson is provided by the course organizer. Each team has up to five minutes for its initial statement, three minutes to respond to the opposition, and two minutes for their final plea. Two neutral judges determine which team has won, based not only on the elegance of their argument but also on the energy displayed by the rest of the group in supporting their protagonists. Great care is taken to ensure that everyone is given a prize. The prizes are given first to the group that has been declared the winner.

7.10 Final week and closing ceremony

On completion of Tasks 3 and 4, the groups are requested, in a letter of remit, to formulate generic Terms of Reference (TOR) for Health Impact Assessment. This is Task 5 and the only Task for which no Guide is provided. The assumption is that, through the task work so far, participants will have (1) recognised that the lack of sound Terms of Reference often is one of the main causes for poor HIAs, and (2) identified items that must be included in an adequate TOR.

This is the last Task for which the tutor accompanies the group. Task 6 is part of the course evaluation and will, therefore, be the sole responsibility of the members of the group. As already indicated above, tutors will be asked to consolidate the group products of Task 5 into one generic Terms of Reference document. This will be presented to the groups for their advice and decision whether or not to forward it formally to the relevant national authorities.

Task 6, the formulation of an intersectoral action plan and the drawing up of a Memorandum of Understanding for the implementation of the action plan is not only of value for course evaluation. For the participants it is the culmination of all previous task work, and the generation of a forward-oriented product that would, in real life, be the start of an operational phase.

It is, therefore, important to make special arrangements for the final plenary session. Certainly for this session an effort should be made to have a senior politician or ministry official in attendance. There should be a formal and at the same time festive atmosphere, conducive to successful and

convincing presentations of the product of three weeks of hard labour. Others who played a role in the course may also be invited: Steering Committee members and representatives of communities that were visited during the field trips. Local resource persons can contribute with frank criticism and honest appraisal.

The presentation of Task 6 findings, conclusions and recommendations are followed by a one hour evaluation session. In the pilot courses a final session of the anchor with all participants was included in the afternoon, where the group reflected on the significance of the course that had just come to an end, what they could do to implement the knowledge and skills they had acquired and what obstacles they might meet in working differently (i.e. more intersectorally) in future.

The closing ceremony

The final evening is reserved for a joint dinner with the presentation of certificates of successful completion of the course as the formal highlight. The anchor presents the Certificate to each participant individually. There may be entertainment organized either by the course staff or by the participants or both. Levels of exhaustion are normally high and participants will usually retire for an early night.

8 How to monitor and evaluate a course

8.1 How to monitor the course

Acceptability

The key criteria for monitoring and evaluation of the course will be acceptability and efficiency. Acceptability looks for evidence that the conduct of the course is acceptable to those who participate in the course and to those who organize and deliver the course. Lack of acceptability reduces the quality of learning and teaching and thus the effectiveness of the course.

Efficiency

Efficiency, that is the time, effort, facilities, and resources expended by providers and participants, is closely related to acceptability and affects the sustainability of the course. Clearly, neither the providers nor participants should be expected to devote more than a reasonable, sustainable amount of time, energy, facilities, and resources before, during and after the course.

Methods of monitoring

Three methods are used: a questionnaire, the Nominal Group Process, and interviews. Examples of methods can be found on the CD-ROM in Part III.

Questionnaire

A questionnaire is used when the course coordinator and the administrator need the participants' perceptions of a range of specific aspects, e.g. the timing and length of the small group discussion sessions, timing, and quality of the different meals, recreation and accommodation.

Because questionnaires do not necessarily provide the participants with an opportunity to express their personal concerns, likes and dislikes, the questionnaire is only used at the end of the course, in order to collect detailed information for the improvement of subsequent courses.

Nominal Group Process

Acceptability, participants' own perception

The Nominal Group Process is used at the midpoint of the course, when the participants have gained adequate experience of both the content, the process and the environment of the course to be able to form a personal view of the acceptability of the course (also see page 53).

The participants elect a chair and a rapporteur, and the anchor explains to them "the rules of the game", as follows:

- (i) The chairperson invites all the participants to write on a piece of paper three aspects of the course, which the individual has found so good/pleasant/helpful that they should not be changed. Each participant is also asked to write down three aspects, which they have found so bad/unpleasant/unhelpful that they must be changed.
- (ii) After a maximum of three minutes, when everything that is of real concern will have been written down, the chairperson invites each participant in turn to nominate one good and one bad issue - without explanation or justification. So that every individual can feel that she or he has a genuine opportunity to voice their views, there should be complete silence from the other participants. The participants' comments should be phrased in not more than four words, e.g. "tutor

- interfered too much” or “evening meals awful” to allow the rapporteur to write all the comments on the blackboard or flipchart (the good in one column and the bad in a separate column)
- (iii) A new comment that has already been recorded, though perhaps in slightly different words, provides an opportunity to ask participants to cross it off from among their items. They should be instructed to do so for any item already nominated by another colleague. This helps to keep this monitoring session as brief as possible.
 - (iv) When the first round has been completed, the chairperson will invite further nominations of a good and a bad aspect from each participant in turn.
 - (v) Quite soon many participants will say “no further comments”. The chairperson can then call for those who have one or more comments yet to be recorded to raise their hand.
 - (vi) When these residual comments have been noted, the chair will point to each recorded comment in turn. In case clarification of meaning is asked for by one or more participants, the person who made the original comment is invited to provide a brief example which explains the meaning - lengthy explanations or justifications should be discouraged.
 - (vii) Lastly, the chair will call for a show of hands from those who agree that a comment is of major importance. The participants can vote for as many comments as they regard as important. The rapporteur will record the number of votes for each comment, so that the collective perceptions of the participants provide an order of priority for the good and the bad aspects respectively.
 - (viii) This information is then shown to the anchor who will join this session to discuss the outcomes and any resulting changes in the course with the participants.

Interviews

Interviews with the tutors and with the local resource persons are undertaken by the anchor.

The tutors meet as a group at the end of each day. They act as the official link between the participants and the coordinator, so that any problems that affect individuals or groups can be discussed and resolved on a daily basis.

Support for tutors

A further subject for discussion is how each group is progressing within its current task. This also provides an opportunity for the tutors to exchange information in relation to their task as group facilitators and to obtain advice and support from the coordinator.

This bonding with and by the tutors is a vital element in the overall success of the course. It is thus important that this debriefing session should be uninterrupted and in a private, relaxed setting with some form of refreshment.

Support for local resource persons

Repeated discussions by the anchor with each local resource person will also be important. These quite senior people may have travelled long distances, in order to contribute to the course. They need to feel that their input is valued and that due attention is paid to their comfort. These considerations are the more important, as the resource persons are not expected to give lectures but to act as consultants who respond to requests from the groups and who provide constructive feedback during plenary sessions. They may thus feel significantly underused.

Note keeping

The anchor will keep detailed notes of his or her conversations with the tutors and the local resource persons. These notes will be a very fertile source of information for deciding on changes for subsequent courses.

8.2 How to evaluate the course

Questionnaire

The methods used for the evaluation of this course follow:

For acceptability and efficiency

An end-of-course questionnaire to record the participants' perceptions of specific aspects of course related expenditures of time and money. A similar questionnaire is completed by the local resource persons.

A pre- and post-course questionnaire aimed to establish any change in the participants' knowledge and attitudes in relation to intersectoral collaboration.

Assessment of the groups' output from Tasks 5 and 6

For effectiveness

- A generic set of Terms of Reference for consultants.
- An intersectoral plan of action with a draft Memorandum of Understanding.

Progress and achievement

These documents should show to what extent the groups had been able to apply their understanding and knowledge. They should also provide evidence of the groups' ability to work cooperatively to accomplish intricate tasks within tight limits of time. For this reason and to assess their capacity of intersectoral collaboration, the groups carry out their last task without their tutor. The course organizer needs to invoke the help of one or more appropriate experts to assess the work of the groups.

Oral report assessment

A marking schedule may be helpful to judge the groups' growing competence in their oral presentation of their end of task reports. The schedule might help to record whether

- All members of the group participated in the presentations.
- All pertinent information was presented in a logical sequence and with the omission of fine detail.
- All presenters spoke audibly, not too slowly and not too fast, referring to, but not reading from legible overhead transparencies, facing the audience and not obscuring the projection screen.
- Lay-out and contents of the presentation materials was adequate.

8.3 Long-term evaluation

Long-term evaluation is highly desirable but may prove more difficult. It would aim to answer the following questions:

- What use have the participants made of the competences, which they developed during the course?
- What help did their senior colleagues provide to reinforce and develop further what they had learned, and to encourage them to practise intersectoral collaboration?

Post course communication

Communication with the participants will also be desirable after the course to send them the results of monitoring and evaluating the course; to lend continuing support as the participants come to apply what they have learned; and to obtain information that relates to long-term outcome evaluation.