

FACILITATOR / MENTOR GUIDE



# Program Planning

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# Program Planning

## LEARNING OBJECTIVES

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At the end of this training, participants will be able to:

- Define a health problem
- Plan a program to address the health problem

## ESTIMATED COMPLETION TIME

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The module should take approximately 10 hours and 30 minutes to complete.

## PREREQUISITES

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Before participating in this module, it is recommended that participants complete training in:

- Introduction to NCD Epidemiology
- NCD Prevention and Control
- Prioritizing Public Health Problems
- Selecting Interventions

## TARGET AUDIENCE

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The workbook is designed for FELTP residents who specialize in NCDs; however, participants can also complete the module if they are working in infectious disease.

## TRAINING TECHNIQUES

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This training module is self-paced. Participants learn the content by reading their workbook and participating in group discussions. Participants practice what they learn by completing skill assessments; they apply what they learn by planning a program.

There are two options for facilitating this training:

1. Individual mentor-directed: A mentor helps the participant complete the training. The mentor's main responsibility will be to review the participant's work and provide feedback.

A mentor will meet with the participant a minimum of two times. At the first meeting, the mentor should orient the participant to the training, provide examples and direction as indicated, answer questions, and set future modes of contact and meeting time(s). Very small groups (less than 5 individuals) may choose to work on the training together and find individual or collective mentor(s).

2. **Classroom:** There are two options for classroom training. For option a, participants read the training material *prior* to attending class and then review what they read in class. For option b, participants read the training material *during* class.
  - a. **Participants read training material *prior* to attending class.**  
The participant workbook is sent to participants prior to attending class, and they are asked to complete only the readings (not the exercises). In class, the facilitator reviews key points at the start of each module section. After each review, participants complete a skill assessment as directed.
  - b. **Participants read training material *during* class.** The facilitator directs students to read the training material and complete the exercises as indicated in the workbook. The facilitator leads group discussions to review what participants have read and reviews participants' answers to the exercises and skill assessments.

## MATERIALS AND EQUIPMENT

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For the Facilitator or Mentor:

- Facilitator/Mentor Guide
- Case Study – facilitator version
- Flip chart and markers
- LCD Projector (optional)

For the Participant:

- Participant Workbook
- Case Study - participant version

## CONFIGURATION OF THE TRAINING ROOM

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If this training will be implemented in a facilitator-led setting, please note the following recommendations:

1. Use a room large enough to host breakout groups of 6–8 participants.
2. Each breakout group should have one rectangular or round table for completing small group work.
3. An ideal training room will have enough space between tables to have flip charts for each group and enough space between tables so that groups will not be too distracted by each other.

## ICON GLOSSARY

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The following icons are used in this guide:

Image Type	Image Meaning
 Book Icon	Participants read a section in the participant workbook.
 Activity Icon	An activity, exercise, assessment, or case study that participants complete.
 Group Icon	A group discussion that you will lead, either to review key points or answers to an activity.
 Flip Chart Icon	Write responses during facilitator-led discussions or debriefs.
 Prepare Icon	An activity in the module for which you need to prepare (e.g., making handouts of a report, identifying a local example).

## PREPARATION CHECKLIST



### Prepare

Review the facilitator version of the case study so that you become familiar with the sample responses.

There are several facilitator / mentor-led discussions throughout this module. Be sure to review this facilitator guide and read the descriptions of following discussions and activities:

- Introduction to the module (including the Sea Horse story)
- Write on a flip chart the main tasks of program planning (and hang on the wall)
- Examples of relevant interventions that address local health problems (using behavioral, environmental, and/or policy strategy) and potential program goals objectives
- How to research evidence-based interventions in the participants' country (e.g., what websites or journals to use)
- Examples of relevant interventions that address local health problems (using behavioral, environmental, and/or policy strategy) and potential program goals objectives

## ACKNOWLEDGEMENTS

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# How to Facilitate This Module

## FACILITATOR / MENTOR RESPONSIBILITIES

This training module is self-paced. Participants learn the content by reading their workbook and participating in group discussions. They apply what they learn by completing exercises and a case study throughout the module.

As a *facilitator*, you will *facilitate* or assist in the participants' learning. Your main roles will be as follows:


- **Introduce** the module topic
- **Lead** group discussions to review or elaborate on what participants read
- **Answer** questions that participants may have during the training
- **Review** participants' work and provide feedback
- **Be a timekeeper**, ensuring participants stay within a general schedule

As a *mentor*, you will perform the same tasks and play a more active role in supporting the participant *after* the training with his or her field work.

## CLASS INTRODUCTIONS AND SECTIONS 1, 2, AND 3

**Total Estimated Time:** 3 hours




- **Class Introductions and Overview of Training:** 30 minutes
- **Readings:** up to 25 minutes
- **Group Discussion:** 30 minutes
- **Case Study (Part 1):** 1 hour
- **Review Answers to Case Study (Part 1):** 30 minutes
- **Key Points:** 5 minutes




Duration	What to Do/What to Say
<b>30 minutes</b>  Group	<b>Class Introductions and Overview of Training</b> <ul style="list-style-type: none"> <li>• Welcome participants to the classroom or meeting room.</li> <li>• Introduce yourself and any other facilitators.</li> <li>• Facilitate participant introductions by asking each participant: to introduce him/herself with the following information:               <ul style="list-style-type: none"> <li>○ His/her name</li> <li>○ Where he/she works and for how long</li> <li>○ Experience with NCDs</li> <li>○ Experience with planning programs</li> </ul> </li> </ul>

Duration	What to Do/What to Say
	<ul style="list-style-type: none"> <li>○ Class expectations</li> <li>● Distribute the Participant Workbook and Case Study for this module.</li> <li>● Explain the module / workbook format: Explain that this training module is self-directed using the workbook and facilitator guidance.</li> <li>● Introduce the module topic by reading the following story: <p data-bbox="574 575 1425 915"><i>Once upon a time a Sea Horse gathered up his seven precious coins and swam though the unknown sea to find his fortune. Before he had traveled very far, he met an Eel, who said, “Psst, hey you, where are you going?” “I’m going out to find my fortune”, replied the Sea Horse proudly. “You are in luck”, said the Eel. For four coins, you can have this speedy flipper, and then you will be able to get there a lot faster.” The Sea Horse gave the four coins to the Eel, put on the flipper and slithered off at twice the speed.</i></p> <p data-bbox="574 940 1409 1199"><i>Soon the Sea Horse came upon a Sponge, who said, “Psst, hey you, where are you going?” “I’m going out to find my fortune”, replied the Sea Horse. “You are in luck”, said the Sponge. For a small fee I will let you have this jet-propelled scooter so that you will be able to travel a lot faster.” So the Sea Horse bought the scooter with his remaining money and went zooming through the sea five times as fast.</i></p> <p data-bbox="574 1224 1425 1446"><i>Soon the Sea Horse came upon a Shark who said, “Psst, hey you, where are you going?” “I’m going to find my fortune”, replied the Sea Horse. “You are in luck. If you take this short cut”, said the Shark pointing to his open mouth, “You will save yourself a lot of time.” “Gee thanks,” said the Sea Horse. He zoomed off into the interior of the Shark and was never heard from again<sup>1</sup>.</i></p> </li> <li>● Ask participants for the moral of the story, as it pertains to program planning.</li> <li>● <b>Moral:</b> If you are not sure where you are going, you are liable to end up someplace else!</li> <li>● Tell participants that this module will help them identify where they are going by learning how to effectively address</li> </ul>

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<sup>1</sup> Adapted from Mager, R. *Preparing Instructional Objectives*. Belmont, California: David S. Lake Publishers, 1984.

Duration	What to Do/What to Say
a public health problem	
<p><b>25 minutes</b></p>  <p>Book</p>	<p><b>Readings</b></p> <p>Tell participants to read sections 1 through 3 until they see the STOP sign (page 11).</p> <p><b>Note:</b> If this module is being completed one-on-one with a mentor, the participant can read at his or her own pace and arrange for meetings with his/her mentor.</p>
<p><b>30 minutes</b></p>  <p>Group</p>  <p>Prepare</p>	<p><b>Group Discussion</b></p> <ul style="list-style-type: none"> <li>• Discuss <u>some</u> of the following topics: <ul style="list-style-type: none"> <li>○ Examples of data sources used in the participants' country (e.g., cancer registries, Behavioral Risk Factor Surveillance System [BRFSS])</li> <li>○ Examples of how community needs are assessed in the participants' country (e.g., what tools are used, what data collection methods are used)</li> <li>○ Clarification of "risk factors", including examples of modifiable and non-modifiable</li> <li>○ Components of a health problem statement. Ask for an example.</li> </ul> </li> <li>• Discuss an example of ranking risk factors by degree of importance and degree of modifiability. <ul style="list-style-type: none"> <li>○ Ask participants for an example of an NCD in their country, e.g., diabetes.</li> <li>○ Ask participants to identify modifiable and non-modifiable risk factors for that disease. List them on a flipchart.</li> <li>○ Ask participants to rank the risk factors based on degree of importance and degree of modifiability. Remind participants that to determine the degree of importance, they need to decide how strongly the risk factor influences the health issue. To determine degree of modifiability, they assess how likely it is that significant changes can be made in the risk factor.</li> <li>○ Record responses on the blank risk factor table you prepared prior to class.</li> </ul> </li> <li>• Discuss an example of ranking subgroups by effect, influence, and modifiability.</li> </ul>







Duration	What to Do/What to Say
<p><b>1 hour</b></p>  <p>Activity</p>	<p><b>Case Study</b></p> <ul style="list-style-type: none"> <li>• Divide participants into small groups that they will work with for the remainder of the module.</li> <li>• Tell participants to complete Part 1 of the Case Study. Participants will read the case study background information and answer questions 1 – 5.</li> <li>• After approximately 1 hour, lead a debrief (see below).</li> </ul>
<p><b>30 minutes</b></p>  <p>Flip Chart</p>	<p><b>Review Answers to Case Study – Part 1</b></p> <p>Ask participants to share their answers. (Refer to the facilitator version of the case study for potential answers).</p> <ul style="list-style-type: none"> <li>• To avoid duplication, ask each group to contribute new responses than the previous group(s).</li> <li>• To review question 3 (ranking risk factors), draw a blank table on a flipchart and facilitate a discussion on how the groups ranked the risk factors.</li> </ul>
<p><b>5 minutes</b></p>  <p>Group</p>	<p><b>Key Points</b></p> <p>Lead a discussion on the main points of the section. Ask for volunteers to contribute one key point.</p>









## SECTION 4: PLANNING A PROGRAM







**Total Estimated Time:** 6 hours, 30 minutes


- **Group Discussion:** 5 minutes
- **Readings and Practice Exercises 2 and 3:** 1 hour
- **Case Study – Part 2, Questions 1 and 2:** 30 minutes
- **Review Answers to Case Study:** 15 minutes
- **Readings:** 10 minutes
- **Case Study – Part 2:** question 3: 30 minutes
- **Review Answers to Case Study:** 15 minutes
- **Readings:** 20 minutes
- **Group Discussion:** 15 minutes
- **Case Study – Part 2, Questions 4 – 5:** 1 hour
- **Review Answers to Case Study:** 20 minutes
- **Readings:** 20 minutes
- **Case Study – Part 2, Questions 6 and 7:** 1 hour

- **Review Answers to Case study:** 15 minutes
- **Group Discussion:** 20 minutes

Duration	What to Do/What to Say
<p><b>5 minutes</b></p> <p> Group</p> <p> Prepare</p>	<p><b>Group Discussion</b></p> <ul style="list-style-type: none"> <li>• Lead a brief discussion of the main program planning tasks they will read about in this section.</li> <li>• As you continue through this section and review responses to the case studies, refer to the list of program planning steps (hanging on the wall) and remind participants where they are in the process.</li> </ul>
<p><b>1 hour</b></p> <p> Book</p>	<p><b>Readings and Practice Exercises 2 and 3</b></p> <ul style="list-style-type: none"> <li>• Tell participants to read the sections on creating a program goal and developing long-term objectives and complete Practice Exercises 2 and 3 (through page 18).</li> <li>• Tell participants to check their answers with those in Appendix A.</li> </ul> <p><b>Note:</b> Optionally, you can ask participants to only complete the readings and then complete the practice exercises as a class.</p>
<p><b>30 minutes</b></p> <p> Activity</p>	<p><b>Case Study – Part 2, Questions 1 and 2</b></p> <ul style="list-style-type: none"> <li>• Ask participants to continue working in their small groups.</li> <li>• Tell participants to complete Part 2, questions 1 and 2 of the Case Study, including reading the background information.</li> <li>• After approximately 30 minutes, lead a debrief (see below).</li> </ul>
<p><b>15 minutes</b></p> <p> Group</p> <p> Flip Chart</p>	<p><b>Review Answers to Case Study</b></p> <p>Ask participants to share their answers. (Refer to the facilitator version of the case study for potential answers).</p> <ul style="list-style-type: none"> <li>• To avoid duplication, ask each group to contribute different responses than the previous group(s).</li> <li>• Record example goals and long-term objectives on the flip chart.</li> </ul>

Duration	What to Do/What to Say
<p><b>10 minutes</b></p>  <p>Book</p>	<p><b>Readings</b></p> <p>Tell participants to read the section on contributing factors (through top of page 20).</p>
<p><b>30 minutes</b></p>  <p>Activity</p>	<p><b>Case Study – Part 2, Question 3</b></p> <ul style="list-style-type: none"> <li>• Ask participants to continue working in their small groups.</li> <li>• Tell participants to complete Part 2, question 3 of the Case Study, including reading the background information.</li> <li>• After approximately 30 minutes, lead a debrief (see below).</li> </ul>
<p><b>15 minutes</b></p>  <p>Group</p>  <p>Flip Chart</p>  <p>Prepare</p>	<p><b>Review Answers to Case Study</b></p> <ul style="list-style-type: none"> <li>• Ask participants to share their answers. (Refer to the facilitator version of the case study for potential answers.)</li> <li>• To avoid duplication, ask each group to contribute different responses than the previous group(s).</li> <li>• Draw a blank table on a flipchart and facilitate a discussion on how the groups ranked the contributing factors.</li> </ul>
<p><b>20 minutes</b></p>  <p>Book</p>	<p><b>Readings</b></p> <p>Tell participants to read the sections on developing an intervention and developing medium- and short-term objectives (pages 20 through 24).</p>
<p><b>15 minutes</b></p>  <p>Group</p>  <p>Prepare</p>	<p><b>Group Discussion</b></p> <p>Lead a group discussion on one or both of the following topics:</p> <ul style="list-style-type: none"> <li>• How to research evidence-based interventions in the participants' country (e.g., what websites or journals to use).</li> <li>• Examples of relevant interventions that address local health problems (using behavioral, environmental, and/or policy strategy) and potential program goals objectives.</li> </ul>



Duration	What to Do/What to Say
<p><b>1 hour</b></p>  <p>Activity</p>	<p><b>Case Study – Part 2, Questions 4 and 5</b></p> <ul style="list-style-type: none"> <li>• Ask participants to continue working in their small groups.</li> <li>• Tell participants to complete Part 2, questions 4 (a-d) and 5 of the Case Study, including reading the background information.</li> <li>• After approximately 1 hour, lead a debrief (see below).</li> </ul>
<p><b>20 minutes</b></p>  <p>Group</p>  <p>Flip Chart</p>	<p><b>Review Answers to Case Study</b></p> <ul style="list-style-type: none"> <li>• Ask participants to share their answers. (Refer to the facilitator version of the case study for potential answers).</li> <li>• To avoid duplication, ask each group to contribute different responses than the previous group(s).</li> <li>• Draw a blank table on a flipchart and facilitate a discussion on how the groups compared the interventions.</li> </ul>
<p><b>20 minutes</b></p>  <p>Book</p>	<p><b>Readings</b></p> <ul style="list-style-type: none"> <li>• Tell participants to read the sections on developing an implementation plan and planning for evaluation (through page 28).</li> <li>• Tell participants that these two sections only provide an overview of implementation and evaluation and that there are separate training courses for these topics.</li> </ul>
<p><b>1 hour</b></p>  <p>Activity</p>	<p><b>Case Study – Part 2, Questions 6 and 7</b></p> <ul style="list-style-type: none"> <li>• Ask participants to continue working in their small groups.</li> <li>• Tell participants to complete Part 2, questions 6 and 7 of the Case Study, including reading the background information.</li> <li>• After approximately 1 hour, lead a debrief (see below).</li> </ul>
<p><b>15 minutes</b></p>  <p>Group</p>	<p><b>Review Answers to Case Study</b></p> <ul style="list-style-type: none"> <li>• Ask participants to share their answers. (Refer to the facilitator version of the case study for potential answers).</li> <li>• To avoid duplication, ask each group to contribute different responses than the previous group(s).</li> </ul>

Duration	What to Do/What to Say
<p><b>20 minutes</b></p>  <p>Group</p>	<p><b>Group Discussion</b></p> <p>Lead a Group Discussion on the following topics related to Developing an Implementation Plan and Planning for Evaluation.</p> <ul style="list-style-type: none"> <li>• An example of a public health program (preferably in participant's country) and the obstacles faced and how they were addressed.</li> <li>• Contingency plans: what to do if things fail or are not being done on time, if money is less than planned, if staff quit, or if participants do not respond to the program as planned.</li> <li>• Planning for Evaluation: brief example of how planning for evaluation was done concurrently with planning a program.</li> </ul>

## SECTION 5: CONCLUSION

**Total Estimated Time:** 50 minutes

- **Readings:** up to 5 minutes
- **Group discussion:** 45 minutes

Duration	What to Do/What to Say
<p><b>5 minutes</b></p>  <p>Book</p>	<p><b>Readings</b></p> <p>Ask participants to read the conclusion section of the workbook.</p>
<p><b>45 minutes</b></p>  <p>Group</p>	<p><b>Group discussion</b></p> <ul style="list-style-type: none"> <li>• Lead a discussion of the main program planning tasks.</li> <li>• Ask for a volunteer to provide you with a program he or she is planning (or a priority health issue).</li> <li>• As a class, walk through each of the program planning steps for that particular program or health issue. Include how to develop an implementation plan and plan for evaluation.</li> </ul>