CHECKLIST FOR SETTING UP AN EDUCATION PROGRAMME

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The purpose of this checklist is to provide support for those seeking to set up a training programme for any health care education programme.. The checklist is comprehensive, and attempts to be generic, and may therefore need adaptation to fit the situation / context of specific training programmes. It can be used as a precursor to setting up a training programme, and may also be used to guide the evaluation of an existing training programme.

Depending on the type of programme being set up, working through this checklist may take up to 12 months to complete. The authors of the checklist, listed below, can be contacted for further information and will be happy to receive any suggestions for additions or edits to this document.

It is recommended that for each of the steps/ tasks listed below, associated activities should be defined, and each activity assigned a timeline, responsible person and reporting mechanism. An example follows:

SITUATIONAL ANALYSIS	Indicator / tasks	Activity	Timeline	Responsible person	Reporting mechanisms
A prior thorough understanding of the situation ……	Obtain information about: ▪ The need for the training	Arrange a stakeholders meeting	5 – 30 August 2007	Joseph P	Discuss report with Dr Faal

CHECKLIST

SITUATIONAL ANALYSIS[1]	
A prior thorough understanding of the situation / programme environment is required	Obtain information about ▪ The need for the training – taking into consideration the context e.g. include SWOT components ▪ Educational regulations, e.g. technician, vocational qualifications ▪ Health career structures, posts and promotion points ▪ Professional regulations/bodies, e.g. Medical and dental council, allied health council, nursing and midwifery ▪ Government personnel management - regulations, schemes of service ▪ Procedures for recognition of new cadres ▪ Pools from which trainees could be drawn ▪ Risks of attrition ▪ University systems, different categories of credits, general, faculty and course related ▪ Potential training institutions already in existence
Stakeholder analysis	▪ identify stakeholders to contribute to training programme development review / (e.g. MoH, MoEd, funders, programme people, training institution, beneficiaries, professional groups, NGOs) ▪ Identify purpose of the development of / review of training e.g. response to population needs/V2020 programme ▪ Document aims of course (match course content and role / job description of graduate) ▪ Involve the Prevention of Blindness Committee Coordinator or working group from the outset
Planning stages	▪ Establish a steering committee of key stakeholders as outlined above
Development of training programme	Convene a workshop(s) to plan and empower those involved in the training programme ▪ Reporting of assessment and recommendations by steering committee to relevant stakeholders ▪ Clear activity plan to take training programme forward Present curriculum by steering committee to governing bodies and NGOs, that includes: ▪ Justification for change / need ▪ Implications of change / need

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[1] V2020 toolkit: http://www.who.int/ncd/vision2020_actionplan/contents/1.2.htm#analysis

	▪ Anticipated improvement / benefits
	▪ Implementation: including e.g. recognition of qualification

RECOGNITION OF QUALIFICATION	
Educational standards / regulations	Establish: ▪ Length of course / Qualification level required for official recognition ▪ Vocational qualifications ▪ Feasibility of delivering the course within a modular system (entry / exist structure of course) Submit curriculum to Academic Board / Ministry of Education
Recognition by professional body / government structure e.g. Medical and dental council, nursing and midwifery	Meet with professional body / government structure to determine ▪ Career structure, posts and promotion points ▪ Salaries schemes of service ▪ Regulations Advocate with policy makers to train personnel within the V2020 plan Advocate for professional body for cadre
Certification accreditation	▪ Determine the role INGOs and WHO can play in certification ▪ Assess accreditation by an international agency e.g. JCAHPO
Recognition by seconding unit	Meet with seconding unit to establish: ▪ Bonding / internship ▪ Sponsorship ▪ Equipment, ongoing supplies ▪ Job description

SELECTION OF STUDENTS	
Documented selection criteria and process	Document selection criteria and process: ▪ Interest, aptitude, manual dexterity ▪ Experience in eye or health care ▪ Academic background and structured requisites ▪ Institutional funding / scholarships for course and reference books ▪ Job after training: Selection criteria and process should be included in V2020 plan and should explicitly state coverage and post training requirements. ▪ Structured interview, transcripts, structured references / recommendations ▪ Suggestion: Exam after 1 month to assess capabilities

CURRICULUM DEVELOPMENT	
Content (What is taught)	Ensure that: ▪ There is a match between documented role of graduate (identified in V2020 plan)/ job description ▪ Competencies / Learning outcomes include mainly **essential** knowledge, skills and attitudes ▪ Soft skills / attitudes e.g. leadership, teamwork, information technology are included ▪ Specialist areas e.g. low vision, systemic diseases, glaucoma, refraction, equipment maintenance included where required ▪ Training of other professional eye team members to provide support to clinicians ▪ Short courses to train support staff
Method (How it is taught)	Teaching methodology should include: ▪ Active learning, problem based approach, self directed learning, critical thinking ▪ Assessment of practical procedures: logbooks, journals, goal setting ▪ Specification of contact hours for knowledge and practical ▪ Specification of time for self directed learning: reflection/ PBL
Curriculum	Ensure the curriculum is: ▪ Documented and available to faculty and students and external training institutions ▪ Competency based ▪ Includes criteria and indicators to measure success ▪ Regularly evaluated (internal and external) against aims and developments in country

Assessment of learning	▪ Include details of assessment, credit ratings /grade level, weighting of written/ practical and criteria for passing, in curriculum
	 ▪ Maintain standards e.g. additional international qualifications
	 ▪ Standardize exams in the country
	 ▪ Ensure validly / reliability of assessment – e.g. external examiners/ marking sheets
	 ▪ Include both continuous and final assessment (written and practical) knowledge, skills, attitudes
	 Types of assessment:
	    - Reflective journals / logbooks for class practise, wetlab and practicals
	    - Case studies / presentations
	    - Peer and self assessment e.g. clinical audit against skills

Training faculty	Ascertain: ▪ Dedicated Faculty (main and supporting/outreach faculty) ▪ External faculty (specialist areas) ▪ Teaching skills matched by faculty, selection criteria ▪ Number required (permanent or other departments) 1:1 or 1:2 Establish ▪ –Courses for teaching methodologies, supervision/mentorship ▪ Opportunities for continuing education ▪ Systems for evaluation of teaching: self (e.g. reflective journals) peer and student assessment
Clinical experience / practicals	Ensure that students and interns have at the base hospital and satellite clinics ▪ Supervision & monitoring during training ▪ Adequate equipment and consumables
Final accreditation	Establish appropraite ▪ Bonding ▪ Internship ▪ Accreditation / certification by government/university/outside agency/professional body accreditation

TEACHING INSTITUTION	
Share teaching & infrastructure resources	Establish networks / communities to facilitate: ▪ Use of other course modules and faculty and visiting faculty ▪ Use of teaching materials & support staff ▪ Availability of ccredited, appropriate external training facility practical
Supporting Training institutions	▪ Situational analysis of supporting training institutions to determine if adequate numbers of patients and faculty equipment and / or community / outreach work ▪ Draft MOU between main and supporting training institutions ▪ Accredit supporting training institutions including appropriate equipment and supplies ▪ Training for faculty of STI ▪ Establish regular monitoring and evaluation ▪ Facilitate settling in process at the base hospital
Training institution Resources	Obtain and set up systems to maintain ▪ Infrastructure ▪ Teaching aids ▪ Student Equipment package ▪ Wetlab ▪ Consumables for trainees ▪ Resource center (books, journals, internet) ▪ Course coordinator/facilitator with organsational skills
Student related learning costs	Document and provide to students information about ▪ Accommodation ▪ Educational materials / books ▪ Indemnity ▪ Transport to outreach / STI ▪ Examination fees ▪ Health
Funding for the course	Write a budget and obtain funding for the course, that includes: ▪ Running costs ▪ Course equipment / resources e.g. Subscriptions to journals, internet access ▪ Indemnity for faculty ▪ Plan and budget for regular evaluation (internal and/ or external evaluation)
Funding for graduate support	Write a budget and obtain funding for support of the graduates after training, that includes: ▪ Supervisory visits ▪ Workshops / conferences ▪ Professional development / continuing education ▪ Plan and budget for regular evaluation (internal and / or external evaluation)

MONITORING AND EVALUATION	
Make sure we are achieving what we set out to do. Use results to make improvements where necessary	Evaluate the: ▪ Theory and practical by students and faculty ▪ Students' performance – knowledge, skills and attitudes ▪ The faculty - self, peer and student assessment ▪ Products /Outcomes ▪ Implementation and monitoring of curriculum ▪ Job description matches aim of course matches what is being taught

GRADUATES	
Enabling environment	Analyze and facilitate an enabling environment where possible. This can include: ▪ Government policies / structures to advocate for best practise ▪ Equipment ▪ Comprehensive eye care team ▪ National strategy of supervisory structures ▪ Supportive / Participatory supervision – clinical and non clinical ▪ Bonding, clinical placement ▪ Mentorship, peer review – role of training institution?
Professional recognition	Provide support for graduates to establish ▪ Career structure / Possibility of branching into other careers ▪ Salary
Professional development of the graduate	Provide support for graduates to establish ▪ Job description ▪ Continuing education / Refresher training courses ▪ Membership of the professional body
Evaluation	Provide training and support for evaluation of performance / outcomes ▪ Self – assessment e.g. portfolios and external ▪ Based on competencies – against indicators / logbooks focus on outcomes, activities and attitudes ▪ Performance appraisal against job description ▪ Provide support to improve performance e.g. refresher training