

Planning a workshop with the toolkit

The toolkit is designed to provide users and workshop participants with the knowledge and skills to find credible evidence for budget advocacy to advance UHC. Budget advocacy plans must reflect the realities of the lives of people affected by the changes advocated, the health policies and systems in place, public finance management and health financing regulations. The toolkit supports facilitators and users to adapt the content to each audience and country.

The toolkit is for adult education, which is learner-centred, draws on the skills, knowledge and experience of participants and ensures that the workshop is focused on impact.

Learning to learners' wants and needs helps shape a program that has immediate usefulness to adults. The dialogue begins long before the course starts (8).

The lead facilitator, who plans the workshop, should be familiar with either budget advocacy, UHC and SDG3. Facilitators rarely have experience and knowledge in all three subjects; therefore, a team of facilitators should be constituted who will complement each other in the various sessions of the workshop. In addition to facilitators, the workshop could benefit from presentations by invited experts, credible researchers or activists and advocates working on UHC, public finance management in general and health financing specifically. Participants in the workshop with experience, skills and knowledge in specific topics could also be invited to make presentations. In addition to the audiences identified by Avrett (9),¹ researchers or partners in the International Budget Partnership (IBP), an international civil society organization specialized in budget transparency and participation, could be invited, for example to present on budget transparency and participation), or from the ministry of finance (on health financing), the World Bank or the ministry of health (on UHC reform, national health planning). The guest speakers or additional facilitators should be selected once the agenda of the workshop has been set.

Once the facilitators have been chosen, they could use the toolkit to set the agenda. The eight steps listed below will ensure that the workshop responds to the organizers' objectives, supports the participants' interest in furthering the goals of UHC and contributes to advocacy by the organizations and networks they represent. The design should reflect synergy between the objectives of the workshop organizers and the interests and UHC advocacy objectives of the participants.

¹ Audiences include health financing analysts and strategists, health financing advocates, health financing activists and organizers and people with direct experience as health providers and consumers.

Eight steps in designing a workshop

Who?	The people	Deep understanding of who will participate in the learning programme and who will lead it
Why?	The current situation, rationale or need	Description of the situation that calls for the learning event or meeting; the complex
So that?	The anticipated change	Realistic vision of what will change as a result of the joint learning experience
When?	The time and timing	Detailed description of the time available for learning, as this will determine the amount and depth of content that can be taught
Where?	The place and space (in-person or virtual)	Best location for learning, and limitations of the place
What?	The content	Carefully constructed set of skills, information and perspectives to be addressed
What for?	The achievement-based objectives	Specific description of what learners will do during the programme, with each piece of priority content, in order to learn it
How?	The learning tasks	A flexible yet structured, process through which all learners build their skills and share their learning

Source: Adapted from Global Learning Partners (10)

The eight steps should be completed well in advance of the workshop. Once a draft is available, the next step is an assessment of learning needs and resources, to be completed by potential workshop participants. The purpose of the assessment is to:

- identify suitable participants for the workshop. For example, such an assessment can indicate their commitment to engage in and advocate on health budget issues in the context of UHC. The assessment can also indicate ways of combining staff from CSOs, media institutions and parliamentarians.
- ensure a balanced mix of participants to enhance learning, experiences, knowledge and skills; and
- refine the agenda and content.

The assessment could include the following questions:

- Describe your involvement in UHC advocacy or health advocacy in general at national level.
- Describe a recent situation in which you had to consider the public budget for health.
- What, in your opinion, are the greatest challenges in your country to budget advocacy to advance UHC2030? List three challenges.
- State how this workshop on budget advocacy will improve your involvement in advancing UHC in your country.

The results of an assessment of learning needs and resources could also suggest content for the modules and sections of the toolkit. Participants could rank their priorities for content, for example from 1 to 10, 1 being the highest priority:

Name:	Organization:	Job title:
On the list of possible workshop agenda items, rank the items from 1 to 5, 1 being the most important to you and 5 the least important.		
Topic	Content	Ranking
Introduction to concepts of public financing for health relevant for UHC budget advocacy	Key concepts of public policy and public policy relevant for UHC	
	Key concepts and information on public budgets, their content, classification and what is relevant for UHC	
	The content of budget documents and that relevant for UHC	
	Information on the overall budget cycle, its stages, actors and the role of the ministry of health	
	Where to find budget information and resources for finding budget information for health and UHC	
	Information on transparency, access to information and citizen participation and its association with UHC goals and principles	
	Ideas on budget analysis relevant for UHC and tools to engage with it	

This example could include the questions above. In planning, it is useful to know participants' areas of interest, experience and knowledge in relation to the subject of the workshop and their intentions for applying their learning after the workshop.

The selection of participants is important for sustaining advocacy and networking for UHC2030. A well-considered selection of participants should include the networks to which

the participants belong, the role of participants in their organizations and their ability to apply the knowledge and skills they gain from the workshop. As some participants may play many roles in their organizations and networks, two participants from each network or organization should attend the workshop. For optimal learning, it is recommended that the number of participants be limited to 24.

Avrett (9) states

(t)he effectiveness of advocacy depends entirely on the people who are leading and powering it. This means that investment in advocacy requires investment in people who can contribute experience, skills and abilities related to the following functions ... health financing analysts and strategists ... health financing advocates ... health financing activists and organizers ... people with direct experience as health providers and consumers.

This group of people should be considered in selecting participants for a workshop.

As the users of this toolkit will include the media and parliamentarians and their staff, the facilitator(s) should work with representatives of those groups in designing a workshop for them. Socio-political power dynamics in each country will determine whether it would be beneficial and strategic to include participants from civil society, the media, parliamentarians and their staff in one workshop, to conduct separate workshops for each group or to combine two of the three.

Achievement-based objectives

Achievement-based objectives are expressed as a verb, e.g. “select”, “define”, “identify”, “describe”, “solve” or “design”. The objectives of workshop give the participants an idea of what is to be accomplished by the end of a module or session. Objectives indicate the tasks and activities to be designed by the workshop facilitator. An example of an objective is: “By the end of this module, participants should be able to: *describe* UHC; *calculate* year-to-year budget growth rates; and *design* a budget advocacy plan for the next 3 years in order to achieve UHC. The workshop facilitators therefore design tasks and activities to allow participants to perform these tasks. The activity may involve multiple steps to reinforce the objectives. Bloom’s taxonomy (11) is a useful reference for workshop designers, as it provides a set of verbs for objectives.