RESOURCES

This chapter addresses the people, money and infrastructure needed to run a short course programme. It is located early in this guide as resources can determine what is feasible, providing the parameters on the basis of which a programme can be designed.

Funding and costs

A budget

Knowing how much a programme of short courses might cost is one of the first steps in working out what size and shape it might take.

Many of us in universities think that the costs will be low as there are buildings and equipment which can be used, plus staff who are already paid salaries. But there is a range of expenses that needs to be considered. These can include having to pay for the use of university facilities and staff as well as accessing external resources like hiring equipment, catering, honoraria to presenters etc.

The following are some items that may be included in a budget:

Venues
▶ Booking fees if you are not using your own venues

Branding
▶ Banners/ posters etc that put your university unit's 'stamp' on the programme

Printing and stationery
▶ Advertisements (particularly if you print brochures / posters / fliers etc)

▶ Registration paperwork /systems (even if registration is on-line)

▶ Handouts: educational materials / readers etc (files/ photocopying/ CDs/ USB sticks)

- ▶ Name tags
- ▶ Stationery (flipchart paper and pens, paper and pens for delegates, etc)
- ▶ Evaluation forms

Catering
- ▶ Teas and lunches for participants and facilitators
- ▶ Refreshments at graduation ceremony and/or public lectures associated with the programme

Transport and accommodation
- ▶ Transport and accommodation of participants (if transport and/or accommodation is included in the fee)
- ▶ Transport and accommodation of guest lecturers /facilitators

Staffing
- ▶ Fees for lecturers /facilitators – commissioned from beyond your school/ university
- ▶ Salaries for administrators, e.g. an extra person or part-time assistance
- ▶ Fees for web / database expert (to upload new information and/or set up an on-line registration system)
- ▶ Payments for security / cleaning staff (extra staff or overtime)

Additional equipment
- ▶ Office equipment – like an extra printer
- ▶ Flipchart stands and/or noticeboards
- ▶ Audio-visual projection – for teaching rooms

Some of the costs may be once-offs (like buying equipment, making an organisational banner) while others are repeated every time courses are run. It is obviously important to know what both of these costs are.

You will not be able to finalise the budget until you engage in some of the programme design, however, as how many people are to be paid, what materials are to be printed etc will depend on what you decide to offer.

Payment for attendance

While this is not the case in South Africa, we are aware that in some countries participants are paid to attend meetings and conferences – a 'sitting fee' or an honorarium – largely to subsidise the costs of transport.

This is quite the opposite of our practice which is that we charge a fee to attend. Clearly when developing a budget you will take into account whatever is suitable in your context.

The UWC SOPH approach

We have always been clear that our Winter School is not primarily an income generator for the School or for the University. We did not conceive of our continuing professional development programme to be a source of revenue and have resisted pressures for it to become so, preferring to remain accessible to a range of participants. While we aim to cover our costs, our primary purpose and rationale is to offer professional development opportunities to role players in the public sector (be they managers, frontline providers or activists) at the lowest possible cost, contributing to strengthening primary health care and health equity in our country.

Course fees

In line with our commitment to accessibility, we have always kept the cost of courses to an absolute minimum, to allow for the fullest participation. In 2016 the fees were

- ▶ R4,300 for a five-day course; and
- ▶ R6,500 for a ten-day course

In 2016, 'foreigners' – i.e. people who applied to attend from outside of South Africa - were required to pay more than local applications: '1 week course = US $600 and 2 week course = US $1100'.

Sponsorship

Currently the Winter School is funded largely by fee income with attendance of many participants being sponsored by their employer like the Department of Health or the civil society organisation with whom they work. We do not obtain dedicated support from external sources for the Winter School – although some funded projects within the School pay the course fees of some of the project staff/ participants where the course is aligned with the project's aims.

There is therefore no funding for bursaries or scholarships for those who cannot afford to attend – although exceptions are occasionally made.

Students and staff are eligible for discounted fees however. Where an MPH student is attending a core module, there is no payment to the SOPH as this is included in their university fees. Other SOPH students may attend courses at the reduced fee of 50%, as may UWC staff.

Sources of income

In summary, you can fund a programme of short courses in a number of ways. These could include:

▶ support from your institution

▶ income from participants' fees

▶ funds raised from donors

▶ fees from providing in-house training

They all have advantages and disadvantages, however – and the ideal would be a combination of a few of these sources.

Support from the university

If there is infrastructure already paid for – including staff – this is a considerable contribution to funding your programme.

In addition, where a university has an active interest in making its intellectual resources available to the public, it may also have a budget that supports aspects of this operation. It is likely to come with strings attached, however – so it would be important to be clear about the conditions under which the funding is offered.

Income from participants' fees

Given our primary interest in making our courses accessible, we have pitched our fees to be as affordable as possible, and to break even. On balance, we make a small 'profit'.

As we sometimes make decisions on whether or not to run a course based on the numbers of registrations we have received, we have a **closing date for registrations**. We encourage participants to register by this date by charging an extra fee for those who register after the closing date. So, for example, in our 2016 Winter School brochure we have urged applicants 'not to wait for your funding to be approved before sending in your application. Late applications, i.e. applications received after the closing date of 29th April, 2016, will be subject to a R500 late registration fee per course.' While this generates some extra income, this practice is motivated by our need for information about the feasibility of courses, so that these decisions are not left to the last moment.

Where courses do not have enough applicants, we consider cancelling or postponing them – unless we have a particular reason (other than financial viability) for continuing. This could include that the topic is integral to the MPH curriculum; or that it is a pilot for a new course, so small numbers are understandable.

Income from participants' fees depends on how many people actually pay them, however! So while people register and even attend their courses, **sometimes they do not pay!** This can be caused by lethargic payment systems in state departments – but can also be caused by people cancelling at the last minute following changes in the external environment, like an outbreak of flu or measles, or disruptions in the public transport system. Under these circumstances we battle to get the fee - and sometimes decide that it is not in our interests to pursue it. As such, fees are not always a highly predictable source of income.

We slightly defray this risk by charging a cancellation fee, to discourage participants from cancelling at the last moment as this causes us direct financial losses. Not only have we already spent money on the participant (printing materials, buying stationery etc) but if the number of registrations drops considerably, we might need to cancel the course at the last moment – and again may have booked travel and accommodation for the presenters etc. In addition, cancelling a course also inconveniences those who have paid on time and set aside the time to attend – and undermines the confidence in our programme.

Our 2016 brochure therefore states that 'cancellations must be faxed or e-mailed to us one week before the commencement of a course otherwise you will be liable for an administrative fee of 50% of the total course fees'.

As mentioned, non-payment of fees and potential **bad debt** undermines fees as a reliable source of income. Organisations book their staff onto a course, assuring you that they are processing the payment (through often quite cumbersome systems) - but the payment does not come for months, if at all. And in our experience, government departments will only pay after the 'delivery of services'. Not only is this sometimes unreliable but this delay in payment negatively affects our cash flow as we must pay staff and suppliers.

While our Winter School brochure for 2016 says 'payment is due within 30 days of application' and 'bookings will only be confirmed upon receipt of payment' – in reality people attend courses while their fee payments are still being processed by their organisations. The issue then becomes whether to insist on payment and possibly risk the relationship with that stakeholder, or to concede and allow them to attend in the interests of the relationship and their participation in future programmes.

In setting up your fee structure, then, you will need to be clear about what risks you might experience and therefore what your income might realistically be – as well as decide on your bad debt and cancellation policies.

Funds raised from donors

Funds raised from donors is certainly less variable once it has been obtained - and this allows one to plan with some certainty. It takes work to raise the funding in the first place, however - and you will know whether funding a short course programme is a priority within your department or university, and/or whether it runs the risk of competing with other projects for funding.

Fees from training contracts

Providing in-house staff training in an institution (like a state health department) can be beneficial to employers as they do not incur travel costs etc – and there can be some customising for their context. For your university unit, this can be a way of raising revenue and of 'cross-financing' your short course programme. Your expenses are likely to be low, while your fee should be pitched to make a profit - and there should be less chance of last minute cancellations.

The disadvantage is that the participants do not meet people from other settings. In addition if the topic is the same as the one you offer in your short course programme, you might undermine your participant pool for that course. You also have to carefully consider the impact on your staff and the coherence of the department. Very frequent travelling for training may lead to fatigue and fragmentation.

Issues to consider

▶ What are your sources of income:

 ▷ does your university have funding for continuing education?

 ▷ what is your participants' ability to pay fees? How might you structure payments to ensure equitable access?

 ▷ are there any likely funders?

▶ How much money might you need:

 ▷ to set up the infrastructure for the programme (once-off costs like equipment, logo design, banners etc)?

 ▷ to run it regularly?

 (Draft a budget outline, using the detailed budget items listed under page 107 below.)

▶ What are your sources of income:

 ▷ does your university have funding for continuing education?

 ▷ what is your participants' ability to pay fees? How might you structure payments to ensure equitable access?

 ▷ are there any likely funders?

University and your unit

▶ If your university is interested in making its intellectual resources available to the public, does it have a budget that you might access? What are the conditions of this support? Might they include pressures to generate surplus income through running a short course programme?

> ▶ What can you get 'for free' from your department/institution? Are there any existing budgets you can you draw on, given common interests (like using equipment that another project is buying)? Are there any constraints on this (e.g. the short course programme work gets the 'leftovers' of staff's time as it is not a priority and quality suffers)?
>
> **Participants**
>
> ▶ What is your policy on how to decide on course fees, bearing in mind issues of access?
>
> ▶ Will you charge applicants an extra fee (a late application fee) if they apply after the deadline?
>
> ▶ What will your cancellation policy be? What circumstances are permissible and what proportion of fees might be refundable?
>
> ▶ On what basis will you decide if a course is feasible - the numbers of participants? Income?
>
> ▶ Would you consider cancelling courses altogether following continuous insufficient numbers?
>
> **Donors and consultancy**
>
> ▶ Would you consider raising funding from donors? Does this conflict with your unit/ university's fundraising priorities?
>
> ▶ Would you consider offering in-house staff training in an institution (like a state health department) to earn income? Would this erode your participant pool for your short course programme?

Location

While you may choose to run some of your courses in a specialised venue – or in the field, when this makes sense to do so – it is probably wise to have a regular location where the courses are held. Ideally this would be at your institution – but if you do not have suitable venues, then it would be ideal to choose a venue to which you have the possibility of regular access.

Depending on the geography of your area / country and the location of health workers you may want to think about whether or not to hold some courses in satellite venues. This was proposed in the 1995 evaluation, in which employers of participants suggested that we 'decentralise some of the courses to increase accessibility'. Certainly the SOPH is no stranger to working in off-campus sites – as seen, for example, in holding interblock sessions for Masters students in the Eastern Cape before the distance learning model was fully embraced. It takes considerable additional logistical work and staff time (for travel), however, and unless there is already an infrastructure that makes this easy, it is probably wise to first run all the courses in the same location.

Parking and transport

Difficulties in getting to and from a course can affect attendance.

Depending on how your participants might travel, you may need to think about

► making sure there are public transport routes nearby – or arrange shuttles from public transport if it is not within walking distance;

► having special parking on campus allocated for your programme;

► providing paid parking vouchers if the parking is only available on a for-pay basis.

If there is not enough available and secure parking on campus, you may need to organise a shuttle and /or security.

This can be costly and a lot of work, however, so it is important to be clear about what you can and cannot offer.

Safety

Holding the courses at times of day when it is safe for people to travel safely is important. So for instance you may need to decide to end each day early if a course is to be attended by women who use public transport, to ensure they get home safely before dark.

Issues to consider

► Do you have access to suitable venues within your own department – or the institution more broadly - to run a short course programme?

► Are these venues accessible to potential participants? Are there any safety related issues you need to consider in relation to the participants when deciding when and where to hold the programme?

► Are there times of the week - and times of the year - that the venues are less / more accessible? Does this match the times that would suit you/ participants?

► Are there public transport routes nearby? If not, how will people get to your course? What impact will transport have on the programme (e.g. will participants cancel if their organisation cannot afford to pay for their transport)?

- ▶ What parking arrangements could you make for participants to park their cars on campus? Are there any safety related issues in relation to the protection of participants' vehicles?

- ▶ Might you need to run some courses in satellite or specialist venues? Do you have the infrastructure and staff to manage this?

- ▶ Will any participants need accommodation? If so, are there suitable affordable places for them to stay nearby?

Venue and infrastructure

You may be able to remove some budget items once you have taken stock of the infrastructure available - both in your own immediate environment as well as in sister departments / institutions. In addition, getting quotes on what it costs to rent/hire what you need will give you an idea of what is possible.

If you are cash rich, you can hire what is not immediately available – but if you are constrained (as most universities and organisations are) and you cannot easily access some facilities, you will need to design your courses in relation to this. So, for instance, if you do not have access to a computer lab, you will either need to hire this facility or decide not to run courses that are dependent on this.

Venues

Ideally your venue should have

- ▶ an entrance area where registration can take place

- ▶ a collection of large and smaller rooms – for different size courses and/or small group work – with movable tables and chairs

- ▶ some rooms with projection facilities and some that are more 'low tech' – e.g. flip charts

- ▶ nearby and sufficient toilets

- ▶ nearby spaces to have teas and lunches

- ▶ nearby catering space to heat / serve food

- ▶ spaces where screens with displays or tables with materials can be displayed

- ▶ prayer facilities

- ▶ cleaning and security staff.

Infrastructure

In its early stages 'the programme relied on the goodwill of participating institutions to provide venue and equipment' which the evaluators noted was 'not sustainable in the long run'. The initial programme suffered from 'poor venues, too few overheard projectors, videos, screens, building and printing equipment, photocopying machines, and little resource material for the course (public health publications). Convenors had expressed concern on the availability of 'stationery and other support equipment.'

Depending on your circumstances, you may need any of the following:

▶ projection – overhead / large screen projector and laptop computer

▶ flipcharts and pens

▶ screens / walls for displaying work produced during the course and/or posters / displays that may complement courses.

The SOPH venues

We are lucky enough to have a magnificent building in which to hold our short courses - but this was not always the case.

We started our life in 1992 as the Public Health Programme in a set of prefab buildings – where we stayed for 17 years until 2009. We ran some of courses there while most courses were held in lecture theatres and venues on other parts of the UWC campus.

In 2009, the Atlantic Philanthropies supported our now much larger School by funding a building with many work spaces and classrooms.

With open spaces that we use for breakaway sessions …

…and for larger events:

Issues to consider

► Given the venue you have chosen, what spaces (teaching rooms, small rooms, open spaces for meals and exhibitions) are available to you? What are the implications of this for the programme design?

► Do you may have specific requirements – like access for people with disabilities?

► Can you make extensive provisional venue and equipment bookings that you can then cancel nearer the time?

► What kind of equipment is easily available to you? What else might you need?

► What furniture and equipment can you book early and then adjust the booking once your needs are known?

► If you are dependent on other venues:

▷ Are there constraints on availability / when your courses can take place? Are there periods which are completely no-go?

Staffing the programme

Convening

The responsibility for convening this annual programme of short course lies with the Executive of the SOPH.

While in the early years courses were convened by a range of experts, including colleagues from sister institutions, our University's quality control processes now require that the School convenes all the courses ourselves. Each course is thus organised by a member of academic staff who has the authority and responsibility to design the course, identify and contract people to teach it, and liaise with the teachers and administrative staff regarding any requirements like materials and equipment etc.

There are clearly other ways of convening a short course programme however. These could include:

► one person taking the lead as central convener, liaising with (and delegating to) various staff as useful; and/or

► an organising committee, possibly comprising academic and administrative staff.

Teaching / facilitating

The teachers/ facilitators are drawn first from our staff and then from sister departments or institutions. Over time, this workload has been built into our staff's (extensive!) job descriptions. This was to address one of the weaknesses identified in the 1995 evaluation namely that holding the short courses 'during university holiday periods imposes an extra strain on the university staff, as long as they are not officially recognised and part of their regular duties'.

Being able to co-facilitate a course with external colleagues with confidence is important. In our experience these relationships have often developed during work together on other collaborative projects, where we learned to know and trust one another. This provides a solid underpinning for a co-teaching relationship.

Payment

Whether or not lecturers are paid for offering a short course depends on each institutional context - particularly given the trends in privatising intellectual labour and encouraging staff to supplement their salaries. In addition there may be a question of whether this work is part of a full-time staff member's work or an additional piece for a part-time person.

At SOPH some external presenters/facilitators are paid while others are not, given that this is part of their standard work – both at our School and at some sister departments and institutions. That being said, when payments are made, they are modest.

For the SOPH's own staff, teaching during Winter School is considered part of their workload and they are not paid an additional fee for doing so.

Administering

It is vital to administer a short course programme well. Not only does it ease the work of the academic staff but it projects a professional and competent image to the participants and their organisations.

The initial situation

One of the weaknesses identified in the 1995 evaluation was that 'administrative support is weak because of a shortage of staff'. They list some of the tasks that needed to be done as 'recruitment of student assistants, collection of fees, follow up of payment of fees, transport, arrangement of accommodation, invitation of guest lecturers, timely planning of the course for the next school, getting the complete list of courses out, public relations and advertisements, writing of funding proposals, annual reports, progress reports etc'.

Currently most of our administrative staff participate in administering the Winter School programme which comprises about 16 courses and attracts between 300 and 400 participants per year. While some of them spend a significant amount of time on this (between 20% and 40% of their workload), others get involved for short periods at particular times during the preparation and implementation of the programme. When the Winter School is running, all staff are expected to help wherever there is a need. In our case it really helps to have a substantial contingent of 11 administrative staff to draw on when it gets busy (for example during registration of participants at the beginning of each week).

Issues to consider

What is the role of course convenors before, during, and after the programme?

▶ What are your academic staff's strengths regarding their areas of expertise in certain topics, teaching skills etc?

▶ How many of your staff are likely to be suited to working with mature practitioners?

▶ Are (suitable) staff members likely to have time to do this extra work? If not

▷ are there ways of making their schedule more manageable? (Is this programme enough of a priority to do this?); and/or

▷ who else might you work with to offer the courses?

▶ What are the tasks that need doing before, during, and after the programme e.g. compiling the programme, handling registrations, collecting course fees etc?

▶ Do your admin staff have any experience in course administration – including interfacing with the public?(What are the tasks that need doing before, during, and after the programme e.g. compiling the programme, handling registrations, collecting course fees etc?)

▶ How much support staff time would you need to administer your short course programme?

▶ Which administrative support staff are available to administer the programme?