

AO Faculty Education Program (FEP)

ORGANIZER MANUAL

This manual has been created for all those who organize Faculty Education Programs (FEP). The aim of this manual is to align the organizational process for the FEP across all regions and Clinical Divisions in order to enhance consistency with the educational plan and maintain a high quality standard.

The manual is complementary to the "[FEP Organizer Support Package](#)" which contains all material and templates needed for the organization and implementation of the online activities as well as face-to-face event of the Faculty Education Program (FEP). This manual explains when and how the different resources in the package as well as other organizational tools in the AO are used when organizing an FEP.

The material in the organizer package is constantly being expanded, updated, and improved. Therefore its contents should not be stored on your personal computer/data storage but the FEP organizer should always get the latest version of all materials directly from the support package.

If after reading this manual you still have open questions regarding the organization and implementation of an FEP, please do not hesitate to contact us:

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Abbreviations & Roles

FDM.....	Faculty Development Manager
FDC.....	Faculty Development Coordinator
RCO.....	Regional Course Organizer

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1. Introduction

Relevant resources in the "FEP Organizer Support Package":

- *FEP Syllabus*
- *FEP Educational Plan*
- *FEP Qualification Criteria*
- *Checklist: Organization Process*
- *FEP Information Brochure (EN only, ES and ZH in production)*

1.1 Program description

The AO Faculty Education Program (FEP) is designed to help participants prepare for a successful performance as faculty.

The program consists of:

Online preparations—5 weeks prior to the face-to-face event

In these five weeks participants are required to complete a self-assessment, conduct online self-study and engage in online discussion.

The intention is to give a foundation and reach a common understanding of how adults learn, giving a lecture, running practical exercises, and leading group discussions. Participants are encouraged to use the online platform to get to know their fellow participants and start interacting with each other.

Face-to-face event—1.5 days

The face-to-face event begins with an interactive morning session that establishes an understanding of quality education at AO courses. In the following sessions each participant gives a 7-minute presentation, facilitates a 10-minute discussion group, and runs a practical exercise. After each of these presentations, discussion groups, and practicals, the participant receives detailed feedback from the group and the faculty/educator. The presentation session including feedback are optionally videotaped to improve the participants' teaching technique.

Online follow-up—10 days

These activities start with a self-assessment followed by contributions made to an ongoing online discussion.

1.2 Goal of the program

The AO Faculty Education Program (FEP) is designed to train AO faculty by improving their educational skills, knowledge, and expertise. In order to achieve this we give participants the opportunity to explore a variety of teaching methods. This program concentrates on practical skills rather than on theory.

1.3 Program objectives

After completion of this program, participants will be able to:

Teaching methods and techniques

- Give a lecture
- Lead a discussion group
- Instruct at the table in practical exercises

Working with learners

- Motivate learners
- Encourage interaction with and among learners
- Give appropriate feedback about performance

Using assessments and outcomes related information

- Use information about learners, their needs and cultural context in the educational process
- Work with outcomes in teaching strategies
- Set reasonable expectations of a teaching learning session
- Evaluate and improve their own teaching performance

In regard to all of the above, participants will also be able to **manage time and logistics** as part of their educational strategies.

2. Participants

New or existing faculty who fulfill the following requirements:

- AO member
- Assigned as faculty to an AO course within 3–6 months upon FEP completion
- Completed two AO courses as a participant
- Recommendation by the AO Country Council of the corresponding Clinical Division
- Good working knowledge of the language the FEP is being taught in

Number of participants: Maximum of 16 for each FEP, minimum of 12

2.1 Travel

- Reasonable and actual travel can only be covered and paid for participants. Participants may not arrive not earlier than the day before the AO Educational Event begins (arrival rule) and leave not later than the day after the AO Educational Event finishes.
- However, where additional AO business related activities are planned for faculty or in cases where participants are involved in other AO Educational Event, or in exceptional circumstances, extended travel arrangements may be appropriate. In all other cases, only travel that is linked to the attendance in an AO Educational Event will be covered.
- Should the participants wish or need to upgrade their flight, extend their stay on either end or fly to/from a location not otherwise considered their "home base", they must first accept the offer from CWT and then upgrade their changes at their own expense. These changes/upgrades are not eligible for reimbursement.
- Only **economy** class to be offered.
- Depending on the participants and location of the FEP the application process for VISA needs to be considered. **Advice:** allot enough time for processes.

• 2.2 Per diem

Please note that no per diems will be paid to participants.

• 2.3 Reimbursements

- AO will cover the following expenses.
 - Travel
 - By air and train: **economy** travel
 - By car: CHF 0.70/km (providing the cost of car travel is not more expensive than an economy flight)
 - Accommodation and meals
 - Course fee
 - VISA (if applicable)

- Reimbursement claims must be effected online (through event room):
 - the latest one month after the training.
 - reimbursement upon submission by AO is only possible upon submission of the original receipts.

3. Regional Education Teams

Relevant resources in the "FEP Organizer Support Package":

- *List: RET Members 2017*

One trained RET educator and one trained RET surgeon is needed to run an FEP. But it is strongly recommended to have two surgeon RET members. Exceptionally, a non-RET surgeon can be used. If unsure, please contact FDM.

3.1 Travel

Surgeon faculty

See 2.2.1a-d for regional travel.

AO will cover the following expenses:

- Travel
 - By air: **Economy** Class should be used on all flights of less than five hours' flight time and for business trips of more than (5) five hours' flight time including connecting flights (as an exception according to AO Travel and Expense Policy for non-travelers), Business Class may be booked.
 - Booking 60 days prior to travel date for intercontinental flights and 30 days for continental flights highly recommended
 - By car: CHF 0.70/km (providing the cost of car travel is not more expensive than an economy flight)
- Accommodation and meals
- Depending on the location of the FEP the application process for VISA needs to be considered and the Faculty supported with their application. **Advice:** allot enough time for processes.

Educators

Please refer to Chapter 8 and the example reimbursement for educators.

3.2 Reimbursement

- Please note that regular per diems will be paid to faculty. Reimbursement claims must be effected online (through event room) at the latest one month after the training.
- Reimbursement claims must be effected online (through event room):
 - the latest one month after the training

- Faculty/guest speaker travel: travel reimbursement upon submission by AO is only possible upon submission of the original receipts proving the travel schedule per rule indicated above and will be limited to the maximum amount a benchmark ticket price between home town and place of AO Educational Event. If the ticket is issued by the official AO travel agency, CWT, travel schedule changes can be requested by the faculty/guest speaker but these will be done at faculty/guest speakers own expense.
 - Be sure to refer to the Non-Employee Travel and Expense Guide for updates

4. Event Room

Relevant resources in the "FEP Organizer Support Package":

- *FEP Program InDesign template (EN only, ES and ZH in production)*

4.1 Creation

- 1) Pending approval within Agresso, the **FEP organizer** is responsible for informing the AO FDM in Switzerland by the end of July of the previous year about the number of FEPs they are planning to run the following year.
- 2) The **FEP organizer** has to inform the AO FDM at least five months in advance about the date, city, and country where the FEP will take place in line with Agresso/Concerto approvals.
- 3) The AO FDC will then create the event in the Event Room and inform the **FEP organizer**.

4.2 Set-up event room

- 4) Once the event room is created, the **FEP organizer** has to fill and manage the following functionalities of the event room under "Setup event room"

Managers

Make sure you as the organizer are listed as manager and contact person and that you receive the notifications from your event (if not contact the FDM in Switzerland).

Manager checklist

This function provides a checklist for the FEP organizers where they can put in their deadlines for open tasks regarding their event and will then be send automatic reminders. This function is optional for the FEP organizers to use but is recommended.

Room description

Add the FEP room description (copy from a previous FEP) and the cost center corresponding to your CD and region.

Tick "Contact" for the event room manager to appear as contact person for the participants.

Tick "Letter links" so that participants requiring a visa can click on the application form.

Room properties

After creating the event room, make the event room visible for all **contributors** (there are NO participants in FD events) from the day the event room is created until the end of the current year or six months after the event ended.

Add the budget provider for the corresponding CD and region and tick the roles applicable for an FEP (**faculty regional, educator, faculty training participant, guest, staff**).

Tick the correct travel agent and un-tick the functions "personal agenda", "videos", "links" from the room features list.

Order your pre-post course assessments at the time of room set up.

Contributor dates

Fill in the exact date and time when the contributors need to be present.

Reimbursement setup

Add the stipends for the regional faculty and the educator according to your regional remuneration policy. Please refer to Chapter 8 for reimbursement calculations.)

Faculty training participants, guests and staff at FEPs do not receive any stipend or per-diem. Therefore insert 0.00 for them.

They also do not get paid for travel days, so tick "0" for all.

- 5) As soon as the **FEP organizer** has filled the "Setup event room" part with the necessary information he/she adds all contributors to the event room with the function "add contributors" under "Manage people".

Manage people

Add all contributors for the event by clicking on the button "add contributor" (room properties need to be filled in first). If inviting a participant from another clinical CD please contact the FDC and indicate which division they should be added to.

When adding each contributor tick "flight" if the contributor requires a flight and add "economy" in the field "Flight guide price" for all faculty training participants.

- 6) As soon as the **FEP organizer** had added all contributors to the event room he/she sends them the standard invitation (including the link to accept or decline participation) with the function "Send invitation/ reminder" under "Communication".

Communication

Send out the standard invitation mail with the link to accept or decline to all contributors with the function "Send invitation /reminder".

Compose new messages to send to all or individual contributors (eg. weekly instructions for the online activities) with the function "Send intramail".

Send out standard reminders regarding the actions assigned to the contributors with the function "Send action reminder".

- 7) As soon as the **FEP organizer** has finished the FEP program with the RET he/she uploads the program to the event room with the function "File manager" under "Manage content". He/she also uploads the program to the "General area" of the D2L course and sends it to the participants via "Send intramail".

Manage content

The FEP organizer uses the function "File manager" to upload the information brochure and the event program.

- 8) As soon as the **FEP organizer** has signed the contract with the hotel, he/she adds the venue under "Manage travel" and assigns all contributors to this hotel.

Manage travel

Add the address of the hotel under the function "Hotels & allocations".

With the function "Itineraries & settings" export the travel data of all contributors (to check who has already booked a flight, or to send to the hotel for the airport pick-up).

- 9) As soon as the **FEP organizer** has signed the contract with the hotel, he/she assigns all the contributors the action "hotel requirements" under "Manage actions".

Manage actions

Tick the actions you want your participants to complete.

Define a start date (date from when on participants can view this action) and a deadline for those actions.

Assign the actions to certain contributors

- 10) A few weeks before the face-to-face event the **FEP organizer** prints the badges and certificates of the participants with the function "Badges" and "Certificates" under "Printing and reporting"

Printing and reporting

Print visa letters, badges or certificates for the contributors with the different functionalities. Ensure names are spelled correctly and ensure not ALL IN CAPS.

To print/save certificates, select an individual participant, SUBMIT, create a folder on K:// for certificates and save as an individual pdf. Using intramail you can select the participants name and send them their individual certificate upon completion of the criteria of the program.

5. Virtual Learning Space (D2L) & Survey Monkey

Relevant resources in the "FEP Organizer Support Package":

- *D2L Participant user guide (EN only)*
- *Email templates for "invitation", "weekly emails", "reminders"(EN, ES, ZH), "final information to faculty", "final information to participants" (EN only)*
- *Weekly instructions for the online activities (EN, ES, ZH)*
- *Online activities overview sheet (EN, ES, ZH)*
- *Booklets (EN, ES, ZH), Checklists (EN, ES, ZH), Articles (EN only)*

5.1 Set-up D2L course

- 1) As soon as the event room is set-up or at least three months before the face-to-face event the D2L course has to be set-up by the AOFDM. The AOFDM then informs the **FEP organizer** and the RET who have to check the content.
- 2) As soon as all participants have accepted the invitation to the event room, the **FEP organizer** has to ask the AOFDM to synchronize all the participants to the D2L course.
- 3) On the day the online activities start the **FEP organizer** needs to send the online invitation email including the D2L user guide and the online overview sheet to all participants (via the event room function "Send intramail").
- 4) A separate automated email will be sent to participants with the pre-course assessment via Survey Monkey. Automated reminders will be sent to those whom have not completed the assessment. At the end of Week 2 the RCO will receive an email to contact the participant. This is a requirement for course certification.
- 5) During the online activities the **FEP organizer** needs to send out the weekly emails with the instructions for each module and if necessary also reminders (via "Send intramail").
- 6) At least one week before the face-to-face event the **FEP organizer** needs to upload the FEP program to the D2L course and send it to all participants (via "Send intramail").

5.2 Support

In case of technical problems to login contact the support address of Faculty Development:
elearning@aofoundation.org

In case of questions regarding the content of a D2L course please contact:
erin.johansson@aofoundation.org or soujanya.vallur@aofoundation.org

5.3 Content

The online activities consist of the following modules and tasks for the participants (these are also listed in the "Online Activities Overview Sheet" that is created by the AOFDM for each FEP):

Test Module (2 weeks)

- Read the User Guide
- Upload your picture to your profile
- Post the absences you might have in the "absences" forum
- Complete precourse self-assessment as sent from Survey Monkey

Week 1—Introduction (1 week)

- Get to know the virtual learning space
- Introduce yourself in the introduction forum
- Reminders of the precourse self-assessment as sent from Survey Monkey

Week 2—How people learn (1 week)

- Read the booklet "How people learn"
- Complete the eModule "How people learn"
- Watch the video "Medieval helpdesk"
- Read the article "Motivation and facilitation"
- Participate in the forum discussion about "Motivation"

Week 3—Giving a lecture (1 week)

- Read the booklet "Giving a lecture"
- Complete the eModule "Giving a lecture"
- Prepare a clinical lecture for the face-to-face event (detailed instructions will be given later)
- Participate in the forum discussion on "Why do we need lectures?"

Week 4—Facilitating small group discussions (1 week)

- Read the booklet "Facilitating small group discussions"
- Complete the eModule "Facilitating group discussions"
- Watch the video "Bad discussion group"
- Use the discussion group checklist to give feedback to faculty about the video
- Prepare a clinical case discussion for the face-to-face event (detailed instructions will be given later)

Week 5—Running a practical exercise (1 week)

- Read the booklet "Running a practical exercise"
- Complete the eModule "Running a practical exercise"
- Prepare for running a practical exercise for the face-to-face event, eg, chunk video, prepare material (detailed instructions will be given later)
- Read "Helping physicians learn and change their practice performance"
- Participate in the forum discussion on "Expectations for the face-to-face event"

Week 6—Follow-up activities (10 days)

- Complete the postcourse self-assessment via Survey Monkey
- Participate in the forum discussion on "What went well" and "Next time"

6. Venue/Accommodation

Relevant resources in the "FEP Organizer Support Package":

- *Checklist: Onsite Material*
- *Template "Hotel Welcome letter", "Hotel Requirements letter" (EN only)*
- *Educational checklists: "Table instructor", "Lecture planning and preparation", "Presentation skills", "Presentations", "Maximising learning in small groups", "Discussion group leader self-rating", "Feedback guidelines" (EN, ES, ZH)*
- *Posters (EN only)*
- *Commitment-To-Change form, CME Evaluation form (EN only)*
- *Practical exercise instructions for participants (EN only)*
- The location and venue should:
 - *Be centrally located and easily accessible for participants.*
 - *Be in a recognized scientific, medical or business center, suitable for hosting an educational event.*
- But must:
 - **NOT** *be luxurious, or tourist/holiday oriented, or an entertainment venue, such as golf, casino, ski, or watersports resort, even if the negotiated price is attractive, bearing in mind **perception** and image of location and venue.*
 - **NOT** *be associated with a touristic high season for the selected geographic location.*

6.1 The hotel

All involved persons should be accommodated in the same hotel, a single room should be booked, normally 2 nights are covered (but this depends on the start and end of the FEP program).

Day before the event: all participants arrive (dinner is not organized by AO: participants are welcome to submit meal receipts).

Precourse-meeting with educator and faculty and course organizer followed by dinner.

Day 1 of the event: lunch and joint dinner with all participants and faculty/ educator (both covered by AO)

Day 2 of the event: lunch after course end (covered by AO) for everybody followed by departure. Postcourse-meeting with educator and faculty and course organizer

The venue should be easily accessible; transfer time from an international airport to the hotel/venue location should be max. 30–45 minutes.

Reason: a short transfer time is desirable so participants can arrive shortly before the event. The venue must have two meeting rooms next to each other with all necessary equipment and facilities.

Requirements for the meeting rooms

- **Acoustic:** Meeting room should be soundproof to avoid distraction from other meeting rooms.
- **Air conditioning:** Should be controllable to support overall comfort.
- **Lights:** Meeting room should preferably have natural light and further adjustable lighting.
- **Free internet access**

One registration table should be set up for registration on the first day outside of the meeting room. Verify participation for participant dinner to confirm reservation with the restaurant:

- Participant list
- Badges and lanyards
- Spare programs



Check with the hotel that meeting rooms are correctly labelled and that directions to the meeting rooms are clearly sign posted:

- Provide the hotel with the AO Foundation Logo and give them clear instructions on how to label the rooms



Faculty Education Program
Meeting Room



6.2 Main meeting room

The main meeting room should be approximately 100m² big and have enough separate space to divide participants into groups.

Set-up and equipment—Day 1 (For Lectures & Small group discussions)

- 20x Chairs placed in U-shape without tables
- 1x Table in the front with a laptop on it
- 3-4x Tables at the back for the course material and for the FEP organizer to sit
- 1x Table at the back for food and beverages
- 1x Data projector & screen & laser pointer
- 2x Flipcharts



Set-up and equipment—Day 2 (For Practical exercises)

- Same equipment as on Day 1 but prepare two tables with two practical sets, two laptops and two DVDs on the evening before for the practical exercises microteaching

6.3 Breakout room

The break-out room should be approximately 40m² big and located next to the main meeting room.

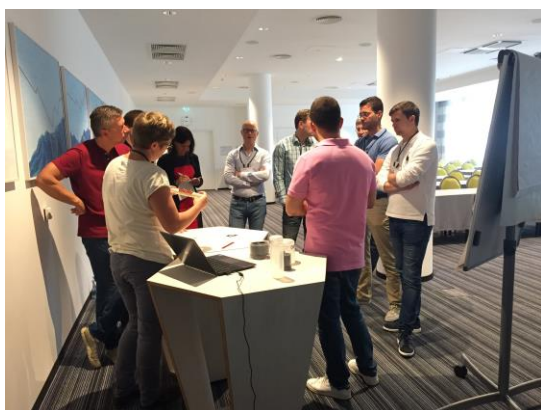
Set-up and equipment—Day 1 (For Lectures & Small group discussions)

- 10x Chairs placed in U-shape
- 1x Table in the front with a laptop on it
- 1x Table at the back for food and beverages
- 1x Data projector & screen & laser pointer
- 2x Flipcharts



Set-up and equipment—Day 2 (For Practical exercises)

- Same equipment as on Day 1 but prepare two tables with two practical sets, two laptops and two DVDs on the evening before for the practical exercises microteaching



6.4 Catering

In the meeting room

Water and coffee should be available throughout the whole program in both meeting rooms.

Coffee breaks

All coffee breaks should take place outside the meeting room to support overall comfort and give participants a chance to get some fresh air. This also allows the organizer to air the room.

Lunches

Lunches should be light and simple and must be carefully selected to cater for all dietary needs (vegetarians, muslims, etc.). Participants are sitting all day and do not need a heavy lunch. Moreover, a big meal is usually served for dinner.

Dinner

A high culinary standard is essential, as participants invest a lot of time to attend this program and it is important that the hospitality given to them is of the highest standard. If travel to the dinner venue is necessary, it should be as close as possible to the FEP venue (max. 20 minutes) and transportation must be arranged.

7. Postcourse

After the face-to-face event is over the following tasks need to be fulfilled:

- Debrief with the RET and take notes (what went well, what should be done differently next time?)
- Scan the "Commitment-To-Change" and (if applicable) the CME evaluation forms, send them together with the participant feedback and the debrief notes to the FDM in Switzerland
- Send the postcourse activities e-mails to the participants (with the group picture if available)
- Send a thank you note to the RET
- Pay any outstanding invoices and update budget
- Send the FEP certificates to those who completed the post assessment (and fulfilled all other requirements -> see 7.1.)
- Ensure that all reimbursement requests (and educator invoices) are handed in within a month after the FEP

7.1 Certificate

In order to be certified as an AO faculty the following requirements must be fulfilled:

- Complete at least 80% of the online activities before and after the face-to-face event including the precourse and post course assessments.
- Attend the face-to-face event and give a lecture, lead a small group discussion, and run a practical exercise
- Complete the Commitment-To-Change (CTC)

If participants have completed all of these requirements, they will receive their FEP certificate. Please note: the AO FEP Certificates will not be distributed at the end of the face-to-face event. They will only be sent to participants once they have also completed all of the postcourse online activities. See instructions on how to print in the event room in Chapter 4.

8. Reimbursement

CONFIDENTIAL

Faculty Education Program (FEP)

Description	Days	Daily fee	Total
Educator		CHF/USD	CHF/USD
Event (1.5 days) incl. pre-course meeting	2	1500.00	3000.00
Online activities (1.5 days) Educator must be involved—part of his job description	1.5	1500.00	2250.00
Travel days: flat rate according to each contract— only if travel time is longer than 6 hours	2	750.00	1500.00

Description	Days	Daily per diem	Total
Surgical educator and Faculty		CHF	CHF
Event (1.5 days) incl. pre-course meeting and travelling time	2	700.00	1400.00
Online activities (1 day—only if Faculty was involved)	1	700.00	700.00
Travel days: no extra travel days			

***Faculty** are guaranteed 2 days per diem for onsite teaching. Additional 1 day per diem for online activity is determined based only on their contribution. If they are not active they **do not** receive a per diem for this effort. Event room should reflect 2 days; additional fee can be added before the start of Week 6. If unsure, please consult FDM.

The following are only examples:

Example: Educator Per Diem

Educator Per Diem in **general** 1500.00 CHF / per day

EU FEP: Non-local educator with longer travel time

Event (1.5 days) incl. Pre-course meeting	3000.00 CHF (2 x 1500)
Online activities (1 1/2 day) incl. Preparation	2250.00 CHF (1.5x1500)
Travel days: flat rate CHF 750.00 within Europe (both ways)	<u>750.00 CHF (0.5x1500)</u>
	6000.00 Total

EU FEP: Local educator living in Zürich

Event (1.5 days) incl. Pre-course meeting	3000.00 (2 x 1500) -
Online activities (1 1/2 day) incl. Preparations	<u>2250.00 (1.5x1500) -</u>
	5250.00 Total

AP FEP: Local educator

Event (2 days live event)	3000.00 (2 x 1500) -
Online activities (1 day) incl. Preparations	1.500.00 (1 x1500) -
Travel day	<u>750.00 (1 day) -</u>
	5250.00 Total

Example: Faculty Per Diem

Faculty per diem in general	700.00 CHF / per day
Regional faculty in AP	600.00 CHF / per day

EMEA FEP (eg. Zurich or Dubai)

Event (2 days) incl. Pre-course meeting	1400.00 (2x700)
Online activities (1 day) (only if Faculty was involved)	700.00 (1x700)
Travel days: no travel days within the region	<u>0.00 (no travel day)</u>
	2100.00 Total

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The AO Faculty Development Pathway

