

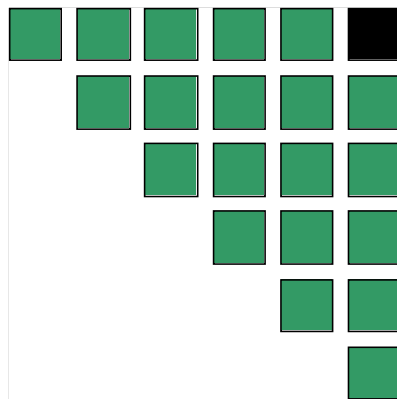
**EMWA**

European  
Medical Writers  
Association

**EMWA**

***EMWA  
Professional  
Development Programme***

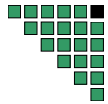
***Workshop Leaders  
Handbook  
December 2008***



**EMWA**

**EMWA**

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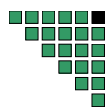
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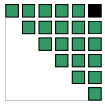
*This Handbook was prepared by Stephen de Looze on behalf of the EMWA Professional Development Committee, which issued this edition in December 2008*

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## 1. Introduction



### **The EMWA Professional Development Programme**

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In this Handbook, the term *workshop* is sometimes used to refer to the entire course, including preparatory and follow up work, leading to attainment of credit. It is also used to describe the *interactive training session* that forms part of the course. This will always be clear from the context.

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**The EMWA Professional Development Programme (EPDP)** provides training for medical writers by medical writers through workshops and homework assignments. It provides one of the few opportunities of attaining a formal certificate in Medical Writing. An important objective of the EPDP is thus to ensure that the medical writing community, employers and clients regard EMWA certification as a valuable qualification. This can only be achieved by establishing a high level of quality of workshops and workshop leaders, and by ensuring that participants meet required standards of performance to obtain credit for workshop completion.

This Handbook defines the standards and quality management process for EMWA workshops that provide credit towards a certificate. It describes the format of EMWA credit workshops and the procedures for developing them and running them during EMWA conferences.

**The EMWA Professional Development Committee (EPDC)** must approve all workshops offered within the EPDP. The chairman of the EPDC is the EMWA Education Officer who is also a member of the EMWA Executive Committee.

Other workshops are also offered during EMWA meetings that are not intended for EPDP credit. These may be full-length (3 or 3.5 hour) workshops on subject areas of more general interest to medical writers, or may be short (1.5 hour) workshops designed to be more informal sessions, including topics that are either better suited to a short format and are not suitable for the credit programme, or may be developed as credit workshops later on. The format and procedures for these workshops are not further described in this Handbook, and prospective workshop leaders interested in presenting a

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non-credit or short workshop should contact the Education Officer for more information.

To assist workshop leaders in preparing material for the approval process, the EPDC has also issued a set of templates. These are presented in section 8 of this Handbook and are also available on the EMWA website. The approval process itself is described in section 4.

### ***Inception and growth of the EPDP***

The EPDP was introduced at the 10th EMWA conference in Dublin in May 2000, growing rapidly from 18 workshops in 2000 to around 40 workshops at each spring conference from 2003 onwards. The 28th EMWA conference in Ljubljana, 2009 will feature 50 EPDP workshops. The autumn conferences have grown in parallel, from 6 EPDP workshops in Lille, 2000 to 20 EPDP workshops in London, 2008.

Initially, only a single certificate level was available, although workshops were always provided at different levels of complexity to suit both the new and the more experienced medical writer. EMWA's own steady growth meant that experienced writers increasingly numbered amongst the membership. To cater for changing membership needs, the EPDP was subsequently restructured, and the ***foundation level and advanced level curricula*** were launched at the 20th EMWA conference in Malta 2005.

The content of the foundation level workshops is aimed at new or relatively inexperienced writers. Advanced level workshops cover topics that are likely to be of greater interest and benefit to more experienced writers, or take foundation level subject matter and deal with it at greater depth. The format of the foundation level and advanced level workshops is the same (see next chapter). However, foundation level workshops have a maximum of 32 participants, whereas advanced level workshops have a maximum of only 20 participants (some advanced workshops have a lower limit to suit their educational objectives). The lower number of participants in advanced level workshops enables workshop leaders to develop a more intense and interactive training session, and provide more detailed feedback on the workshop assignments.

Inevitably, there can be no sharp dividing line between foundation and advanced topics and the EPDC will decide in each case whether a new workshop is more suited to the advanced level rather than the foundation level curriculum.

## ***Foundation and advanced level certificates***

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This section provides a brief overview of the certification process to enable workshop leaders understand the needs of participants. Certification is described in detail in the EPDP Brochure, available on the EMWA website or from head office.

All credit workshops are assigned to one of five options, each of which is offered at foundation and at advanced level. The five options are:

- Drug Development
- Language and Writing
- Medical Communication
- Medical Science
- Professional Techniques

There are two levels of certificate: *foundation* and *advanced*.

An EPDP **specialised** or **multidisciplinary** certificate at foundation level is awarded to candidates who have gained credits for eight foundation workshops as follows:

- At least five workshops in a single option to qualify for a **specialised** certificate in that option.
- Workshops in at least two options but no more than four workshops per option for a **multidisciplinary** certificate.

Candidates may obtain more than one specialised foundation certificate after completing the appropriate requirements for each certificate.

An EPDP certificate at advanced level is awarded to candidates who obtain credit in any eight advanced workshops. Advanced certificates are limited to one per candidate.

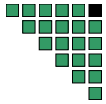
There are no formal prerequisites to enrol at advanced level. However, in order to obtain maximum benefit from the workshop and minimize the risk of failing a workshop, participants are strongly advised to select each workshop according to their educational needs and experience in that particular area. Workshop leaders of advanced workshops will keep the focus of the workshop at an advanced level and will not spend time responding to the needs of inexperienced participants—not least because this would be unfair to experienced participants.

Participants must be enrolled in the EPDP at the foundation or advanced level to collect workshop credits for the corresponding certificate. There is no time limit for collecting credits towards an EPDP certificate, but EPDP re-registration fees will become due after five years.

The number of credit workshops that a participant may attend at any one meeting is *limited to four*. This is to ensure that participants have sufficient time to study for the workshops and complete the homework to gain the maximum benefit from the training. Furthermore, the EPDP should accompany work-related experience, and the value of the certificate is greater if it is not possible to complete it in less than two years.

Limiting the booking of credit workshops to four per registrant also helps reduce waiting lists (in earlier years, unrestricted booking meant that all except the earliest applicants had difficulties in finding a place on the credit workshop of their choice). Registrants may now also indicate a first and second choice of workshop for each conference session, which further helps registrants to secure a workshop of their choice.

## 2. Workshop Format



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This format must be used for all workshops offered for credit towards an EPDP certificate. The format of non-credit workshops can be discussed on a case-by-case basis during workshop approval (see section 4).

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The workshop leader must prepare the following four elements, and each participant must successfully complete all four within allotted times (see below and section 5) in order to gain credit for the workshop that will count towards obtaining an EPDP certificate:

- needs analysis questionnaire
- pre-workshop assignment
- workshop
- post-workshop assignment

Workshop leaders must provide the needs analysis questionnaire and the pre-workshop assignment to EMWA head office, who will distribute them to workshop participants upon registration. This material should be made available to head office electronically for further distribution to participants by e-mail. However, workshop leaders should bear in mind that sending large electronic files to participants may cause problems when downloading into mailboxes and can be inconvenient to print out, and so should avoid these if possible.

*Note: EMWA is currently introducing new website technology which will enable head office to post the needs analysis questionnaires and pre-workshop assignments to the EMWA website; participants will access and download the materials using access codes for their workshops that they receive upon registration. Workshop leaders will provide the assignments to head office electronically, as before. Full details will be made available when the new process is implemented.*

### **The needs analysis questionnaire**

All participants will receive the needs analysis questionnaire specific to the workshop at the time of workshop registration and will be asked to return this to the workshop leader at least two weeks before the workshop date; the workshop leader can determine the exact timing. This questionnaire will help the

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workshop leader to determine the needs and expectations of the participants. Using the results of the needs analysis, the leader may wish to adjust the training session, e.g., the time allocation to the different topics, or the use of more basic or more advanced material. At the beginning of the training session, the leader should tell participants what adjustments have been made on the basis of the needs analysis.

### ***The pre-workshop assignment***

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Participants receive a pre-workshop assignment together with the needs analysis questionnaire, to help them prepare for the workshop. The form of the assignment will be determined by the workshop leader, e.g., preparatory reading, completion of a written exercise for discussion during the workshop, or preparation of material that may be used during a workshop activity. If the assignment takes the form of a written exercise that has to be returned to the workshop leader before the workshop, it should normally be returned together with the needs analysis questionnaire, i.e. at least two weeks before the workshop date.

There may be cases where a participant may not be able to meet the deadline; a common reason is late registration. In these cases, workshop leaders should normally permit the participant to obtain credit for the workshop provided the needs analysis and pre-workshop assignment are received at an individually agreed deadline *before* the workshop. This could even be immediately before the workshop begins, if acceptable to the workshop leader. Completion of the pre-workshop assignment *after* the workshop is **not acceptable** if the participant wishes to obtain credit towards an EPDP certificate.

The pre-workshop assignment should usually take no more than 2 hours. It is not an assessment of skills; however if the assignment takes the form of an exercise that is returned beforehand, the workshop leader should check that performance on the exercise meets expectation. If this is not the case, the workshop leader should incorporate this result into the needs analysis and should adjust the content of the training session accordingly, as described above.

## ***The workshop***

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Workshops take many forms; some are principally presentations of information while others may include extensive group exercises. A recent development of advanced workshops is the “master class”, where a small group of participants receive intensive guidance from the instructors while undertaking practical assignments. Whatever form the workshops take, it is a feature of the EPDP that workshops are *interactive training sessions* and not simply lectures. Questions and discussion must be actively encouraged, and some group activity is strongly recommended. Moreover, workshop leaders should be aware that some participants may have valuable knowledge and should be encouraged to share it. Thus, the workshop leader’s role may sometimes be seen as facilitating knowledge exchange amongst the participants as much as imparting the leader’s own knowledge.

Foundation workshops should generally take 3 hours, though the EPDC will approve workshops of 3.5 hours if this appears appropriate. Advanced workshops will often be 3.5 hours in length. Longer workshops are less effective instruments for training, and workshop leaders might consider providing two workshops on the topic if there appears to be too much material to be accommodated into this format. In some cases, two workshops may be offered as a “double workshop”, i.e. run during consecutive sessions at an EMWA conference and entitling participants who attend both workshops to two credits. In such cases, the first workshop will also be offered as a “stand-alone” topic so that participants may take the second workshop during another conference.

Figure 1 is a guide to the allocation of time during the workshop. The figure demonstrates how the available time for presentation and application of information is limited; experience has shown that workshop leaders can easily overestimate the available time.

Content		Time	
Getting started		10 minutes	
Content I	I	70 minutes	
	A		
Content II	I		
	A		
Summary and preview			
BREAK			20 minutes
Content III	I		70 minutes
	A		
Content IV	I		
	A		
Conclusion and post-workshop assignment			
Evaluations		10 minutes	

3 hours

**Figure 1:** Time allocation guide for workshops of 3 hours' duration. The content of the workshop has been divided schematically into four parts (Content I-IV), each part consisting of information (I) and application (A), the latter being group activities such as question-and-answer sessions, discussion, and group exercises.

Participant evaluation (scores and comments) of the workshop is an essential part of the EPDP, and leaders will be provided with the appropriate forms for distribution at the end of the workshop. Participants ideally should have time to complete the forms before leaving the workshop room. They can leave the completed forms in the room or, preferably, deposit them in a box provided on the EMWA desk. Workshop leaders should collect up any completed forms left in the room and bring them to the EMWA desk. Some participants may of course prefer to complete the evaluation forms later and hand them into the EMWA desk.

### ***The post-workshop assignment***

This assignment is intended to evaluate the skills that the participants have acquired and should usually take no more than 3 hours to complete. As shown in Figure 1, some time must be reserved during the workshop to explain the assignment to participants. This must include the criteria defining satisfactory completion of the post-workshop

assignment, including the time by which the assignments must be returned.

Workshop leaders should provide the assignment to participants, with written instructions for its completion and return, in one of the following ways:

- electronically, before the workshop
- as paper, at the end of the workshop
- electronically, after the workshop

In the first case, the assignment should be included with the needs analysis questionnaire and the pre-workshop assignment, in the materials sent to EMWA head office for providing to registrants upon registration. This has the advantage that no materials need to be copied and brought to the conference. It has the disadvantage that participants may mislay the materials in the intervening time. In the second case, the workshop leader can be sure that each participant receives the materials and can consult them during the closing part of the workshop when the assignment is explained. Furthermore, for post-workshop assignments that cannot be made available electronically, this is the only possible option. In the third case, the advantage is also that no materials need to be copied and brought to the conference, but workshop leaders must ensure at the end of the workshop that they have an up-to-date e-mail address for each participant (EMWA head office will usually be able to supply this information).

Workshop leaders must inform EMWA head office of participant credit status **10 weeks after the conference**. It is therefore advisable that workshop leaders ask participants to return the completed assignment no later than 6 weeks after the workshop date, thus leaving workshop leaders about 4 weeks to assess the responses.

As with the pre-workshop assignment deadlines, workshop leaders *may* accept late delivery of the post-workshop assignment at their discretion. However, any late delivery of the post-workshop assignment from an individual participant must not affect the above 10 week deadline for informing EMWA head office. Because late delivery of assignments will delay the entire update of the credit database, and hence may delay issuing of certificates for all successful candidates, workshop leaders should be much more stringent when dealing with late post-workshop assignments, and should

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stress to participants during the workshop that this could lead to forfeit of credit.

The workshop leader should provide feedback to the participants, e.g., by returning the marked homework with comments, or by providing example answers. This feedback can be sent either directly to the participants if e-mailing is an option (this is the preferable alternative), or as paper to EMWA head office together with the participant completion status; in the latter case, EMWA will then distribute the feedback to the participants together with notification of their credit status.

See also section 5 for an overview of the timing of these milestones.

### ***Visual aids***

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Visual aids (nowadays mostly PowerPoint presentations) are invaluable when attempting to convey complex information, and it is crucial that they are of adequate quality. A complete guide to ensuring quality of visual aids is beyond the scope of this Handbook, but much useful information is available in textbooks and on the web. A useful reference is the website <http://www.presentersuniversity.com/>. The topic is also dealt with during the train-the-trainer forum (see section 6).

The following instructions may provide a remedy to some of the more common problems that have been noted by the EPDC:

- limit the number of colours used: multiple colours do not project well
- use contrasting text and backgrounds
- use strong colours
- limit text to approximately seven words per line, and five or six lines per slide
- do not use upper case text
- keep graphs and charts simple

## ***Promotional aspects during workshops***

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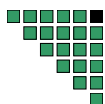
EMWA highly appreciates the fact that many workshop leaders are professional trainers who provide their services to EMWA without a fee, whether for the workshop itself or for the time spent before and after the workshop in preparing materials and marking assignments. This enables workshop registration fees to be kept much lower than those charged by professional training organisations. This arrangement strengthens the spirit of the association, which serves to bring experienced and less experienced medical writers together for networking, training and professional development.

In return, workshop leaders reach a wide audience and may thereby establish contacts which are fruitful in their professional activities outside EMWA.

Nevertheless, workshops should not be promotional in nature, and company logos and websites should be used discreetly.

Workshop leaders may provide their business cards and other material such as notepads and pens to participants during the workshop. EMWA also provides a freelancers table where promotional material can be displayed throughout the conference. Conference sponsors have additional opportunities, including display booths and distribution of materials in the conference folders.

### 3. Workshop Credit



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Many participants require for their training records a **certificate of attendance** for each workshop they attend. These certificates are not credit certificates. EMWA provides certificates to workshop leaders, who should complete, sign and distribute them **at the end** of the workshop. This is to ensure that only participants who attended the whole workshop receive a certificate of attendance.

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EMWA notifies participants of their credit and certification status within three months of the conference. This information is often crucially important to members to demonstrate their qualifications to employers, prospective employers and clients. To enable EMWA to meet this commitment, workshop leaders must send head office corresponding information promptly. Before the workshop, head office provides leaders with a participant list as a form that also includes the EPDP enrolment status (foundation or advanced) of each participant, and columns for the workshop leader to enter details of receipt of pre-workshop materials, workshop attendance and satisfactory completion of the post-workshop assignment, so that the workshop leader can assess whether credit should be awarded to a participant. Workshop leaders then return the completed form to head office, or list out the credit status of each participant in an email to head office, **not later than 10 weeks after the workshop** (see section 5).

Workshop leaders are strongly encouraged to help participants attain a satisfactory result and receive credit. It is not the aim of EMWA or the EPDC to act as an “examination board”, but rather to support and guide members through their professional development. However, it would devalue the EPDP certificate and be unfair to successful candidates if credit were to be awarded in all cases regardless of individual performance.

As stressed above, in order to gain credit, participants must be enrolled in the EPDP, and have completed the needs analysis questionnaire and pre-workshop assignment *before* the workshop, have attended the workshop *in full* (see below), and have successfully completed the post-workshop assignment within the allotted time.

Participants who leave a workshop before the end (e.g. due to travel arrangements) should be aware that they may forfeit credit. This is at the workshop leader’s discretion, and the workshop leader may insist that anyone leaving before the end

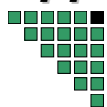
of the workshop will not receive credit. Credit should usually be withheld if a participant misses more than 15 minutes of instructional time. Since the last part of the workshop will be concerned with an explanation of the post-workshop assignment and evaluation forms (see Figure 1), leaving before this point may be more generally acceptable in terms of awarding credit. It is expected, of course, that any participant who leaves a workshop before the end does not cause any disturbance to other participants.

Participants, especially new EMWA members, are sometimes unaware of all the EPDP requirements before the workshop. The workshop leader should, if possible, clarify with participants who have fulfilled only part of the requirements that they are not intending to collect credit for the workshop. For example, if they have submitted the needs analysis questionnaire and pre-workshop assignment on time, but (according to their enrolment status) have not paid the EPDP enrollment fee, the workshop leader should double-check during the initial workshop roll-call that the participant is aware that no credit can be awarded unless the fee is paid. If the non-payment was an oversight, the participant can register for the EPDP during the conference. **It is not permissible for participants to register for the EPDP after the conference and receive credits for that conference retrospectively.**

Another situation requiring clarification is when the workshop leader has received the needs analysis questionnaire on time from a participant but no pre-workshop assignment (or vice versa). In these cases, the workshop leader should contact the participant as soon as possible after the deadline has expired to check that material has not gone astray and that the participant is aware that no credit can be awarded unless all required materials are submitted before the workshop. As mentioned in section 2, a later deadline may usually be set for the missing pre-workshop material.

If the workshop leader feels that a participant who is seeking credit has not met the goals of the post-workshop assignment, the case should be discussed with the Education Officer. The workshop leader should then personally contact the participant, who may be asked to redo the assignment if this is a sensible option (this might not be the case if the assignment is assessed on the basis of “right” and “wrong” responses to questions), or to attend the workshop again at no extra charge.

## 4. Workshop Approval



The EPDC welcomes proposals from EMWA members for workshop topics of interest and encourages members to come forward as prospective workshop leaders. Workshops of a primarily commercial or promotional nature will not be of interest. The Education Officer will publish a call for new workshop leaders and suggest topics in *The Write Stuff* from time to time.

The approval process described below applies to workshops intended for inclusion in the EPDP. Workshops of general interest, but not considered by the EPDC appropriate for credit towards an EPDP certificate, may also be approved as “soft skills” workshops by the EPDC. The format and content of such non-credit workshops will be discussed with workshop leaders on a case-by-case basis. Alternatively, these topics may be presented as seminars during an EMWA conference and not under the remit of the EPDC. In this case, the prospective seminar leader should contact the EMWA President for further details.

### ***Before the workshop***

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Prospective workshop leaders must first submit a brief proposal for the workshop for discussion by the EPDC. The format of this proposal is not prespecified, but the template for the workshop outline (section 8) may be useful, not least because the outline will be required in the next step. The proposal may be submitted to the Education Officer or to any EPDC member, either by email or personally (e.g. during an EMWA conference).

If the EPDC considers the proposal suitable, prospective workshop leaders will be assigned a **mentor** (a member of the EPDC or an experienced workshop leader), to assist in the development of the workshop. There are no time limits set for this activity unless the workshop is chosen by the EPDC for presentation and assessment at a forthcoming conference. In this case, the workshop leader will be invited to prepare and

finalize their materials and run the workshop according to prespecified deadlines (see section 5 for an overview). The status of the workshop for the conference will be “under assessment” and no EPDP credit will be awarded to participants; however, a lower workshop fee will apply as an incentive for participants to enrol, who may not be seeking credit towards an EPDP certificate.

Before the workshop is run, workshop leaders must submit the following **final draft** materials for assessment using, as applicable, the templates and instructions given in section 8:

- checklist
- abstract for inclusion in the conference brochure
- workshop outline
- needs analysis questionnaire
- description of the pre-workshop assignment
- description of the post-workshop assignment
- all presentation materials and handouts, and materials for the pre- and post-workshop assignments
- workshop leader personal summary

“Final draft” means that the materials are finalised from the point of view of the workshop leader, but that changes may be requested by the EPDC. It is not appropriate for workshop leaders to submit early drafts. In general, the mentor will advise when the materials are appropriate for submitting to the EPDC.

As mentioned above, the EPDC may set deadlines for submitting this material. If it is planned to run the workshop at an EMWA conference in the near future, the abstract may be the most urgently required element because of brochure printing deadlines. The workshop outline, need analysis questionnaire, and descriptions of pre- and post-workshop assignments will be required for review and discussion within the EPDC, allowing sufficient time for feedback to the workshop leader. The needs analysis questionnaire and materials for the pre-workshop assignment must also be available in time for distribution to participants before the workshop (see section 2). Not less than two weeks before the workshop, all other presentation materials and handouts, and a copy of the materials for the post-workshop assignment, will be required by the EPDC, which might also suggest changes to the presentation materials at this stage.

This stepwise procedure has been developed because it is often much easier for workshop leaders to produce their materials in this fashion. However, workshop leaders will very much assist the work of the EPDC and are likely to receive more consolidated feedback if they submit all materials together by the earliest deadline.

The EPDC appreciates that preparing a workshop entails considerable time, effort and resources. Nevertheless, the procedure described above is crucial to ensure that workshop materials meet the quality standards of the EPDP. In cases where the preparation is spread between two workshop leaders (who may jointly present the workshop), all communication with the EPDC must be conducted by a primary contact person, who must submit all materials for both leaders in a co-ordinated manner.

### ***The workshop***

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Two observers assess each new workshop run by a new workshop leader. One of the observers will generally be the mentor assigned to the workshop. The other observer may be an EPDC member or another experienced workshop leader. The EPDC maintains a list of workshop leaders who have volunteered to act as observers. Observers are not included in the total maximum number of participants (see section 1) and do not pay a fee for attending the workshop in this capacity.

In the case of established workshops run by a new workshop leader, or of experienced workshop leaders providing a new workshop, it may be sufficient to assign only one observer to perform the assessment. This will be at the discretion of the Education Officer.

The workshop leader or leaders will conduct the workshop, albeit not for credit, in the format that will be later used when the workshop is included in the EPDP. This will include setting pre- and post-workshop assignments, and participant evaluation. Where two leaders jointly present a workshop, the partnership must have been carefully rehearsed beforehand.

## ***After the workshop***

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Participant evaluation (scores and comments) and reports from the two observers will be considered by the EPDC, as soon as possible after the workshop is held.

The workshop may be approved outright, or the EPDC may require further changes. In some cases, the workshop leader(s) may be requested to run the workshop another time under assessment.

## ***Continuing assessment***

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The EPDC reviews workshop evaluations and participant comments as soon as possible after each approved workshop is held. The evaluations are also supplied to the workshop leader by EMWA head office, and leaders are strongly advised to review the evaluations and act upon them as appropriate; the EPDC may also offer guidance. The same applies to the evaluations of the post-workshop assignments. In addition, the EPDC may delegate observers to attend approved workshops on an ad hoc basis.

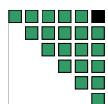
The EPDC approves workshop leaders for specific workshops. If an approved workshop leader develops a new workshop on a different topic, the EPDC must approve the new materials.

Workshop leaders must keep their materials up to date. Updating is generally considered a minor change to the workshop and does not require re-assessment or re-approval. However, if there are major changes to a workshop, the workshop leader must notify the EPDC by submitting a new outline, and must prepare a new abstract for the conference brochure. If a workshop leader plans to make major changes to an approved workshop, they should contact the EPDC as soon as possible so that the changes can be approved in time. As a general rule, major changes are those that affect the structure, timing and content of the workshop, workshop exercises or assignments. If the workshop leader is uncertain, they should contact EPDC for guidance.

Exceptionally (e.g., last minute unavailability of another workshop leader), an approved workshop leader may be asked by the EPDC to lead a different workshop, provided that the workshop materials have already been approved.

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## 5. Overview of Timelines



In the preceding sections of this Handbook, various milestones are described that must be met by workshop leaders, the EPDC, EMWA head office and workshop participants. These milestones pertain to planning and follow-up of workshops, to submission of materials and to EMWA credit and certification.

The charts on the next two pages provide an overview of the deadlines associated with these milestones. The charts should be used as an aid to scheduling the development of new workshops and the provision of materials for approved workshops. The timelines for the autumn conference are tighter than for the spring conference, since in each case, the starting point for conference planning is the previous spring conference. However, the autumn conference is normally much smaller than the spring conference and hence the Education Officer and the EPDC require less time for planning the programme, overall logistics, and for review of materials.

The number in the column “Weeks” is an approximation of the number of weeks before (negative) or after (positive) the conference that the milestone occurs. In many cases, the milestones give the earliest or latest possible deadline for a particular activity and the appropriate section of the Handbook should be consulted for further guidance.

The months identified with particular weeks in the two charts will depend on the exact dates of the conferences. The charts assume that the spring conference is held around the middle of May and the autumn conference within the first half of November, though this may not always be the case.

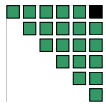
## The spring conference

Weeks	Milestone
-52	<i>May</i> <b>Previous spring conference:</b> EPDC meeting decides which new workshops that were run under assessment will be included in the EPDP as credit workshops.
-48	<i>Jun</i> Education Officer contacts prospective workshop leaders about their availability for the next spring conference. This may include workshop leaders with new workshops to be run under assessment at the next autumn or spring conference.
-32	<i>Oct</i> Workshop leaders of approved workshops and workshops under assessment at the next spring conference send personal summaries and final draft abstracts to the Education Officer for forwarding to EPDC for review. All final draft materials for workshops under autumn assessment must be available earlier than this milestone to meet deadlines for the autumn programme (see next chart).
-28	<i>Nov</i> <b>Autumn conference:</b> EPDC meeting decides which new workshops that were run under assessment will be included in the EPDP and, if applicable, offered for credit in the next spring conference workshop programme. EPDC discusses final draft abstracts of new and approved workshops and may propose changes.
-27	<i>Nov</i> Education Officer finalizes the spring workshop programme.
-26	<i>Nov</i> Workshop leaders finalize materials and send personal summaries, abstracts, pre-workshop assignments and needs analysis questionnaires to EMWA head office.
-20	<i>Jan</i> Spring conference brochures are printed and distributed.
-18	<i>Jan</i> Workshop registration opens. EMWA head office provides registrants with workshop materials on an ongoing basis.
-6	<i>Apr</i> Workshop registration closes. EMWA head office sends participant list forms to workshop leaders that list workshop registrants and their EPDP enrollment status.
-2	<i>May</i> Participants provide the completed pre-workshop assignment and needs analysis questionnaire to workshop leaders (who may set an earlier deadline but make exceptions for late registrants). Last date for new workshop leaders to submit final draft versions of presentation materials, handouts and post-workshop assignments to the EPDC, which may still request final revisions before the conference.
<b>0</b>	<b>May THE SPRING CONFERENCE</b>
+6	<i>Jul</i> Participants provide the completed post-workshop assignment to workshop leaders. Some workshop leaders may set earlier or later deadlines.
+10	<i>Aug</i> Workshop leaders return marked assignments and any additional material (e.g. list of correct answers) to participants (e-mail) or EMWA head office (paper). They return the completed participant list forms to EMWA head office, or email head office with the credit status of each participant.
+12	<i>Aug</i> EMWA head office forwards the statement of credits to participants, together with the marked homework, if applicable. Participants eligible for certification receive their certificate in the following weeks.

### **The autumn conference**

<b>Weeks</b>	<b>Milestone</b>
-24 <i>May</i>	<b>Previous spring conference:</b> EPDC meeting decides which new workshops that were run under assessment will be included in the EPDP as credit workshops.
-22 <i>May</i>	Education Officer contacts prospective workshop leaders about their availability for the next autumn conference. This may include workshop leaders with new workshops to be run under assessment at the autumn conference.
-16 <i>Jul</i>	Workshop leaders send personal summaries, final draft abstracts of approved workshops and all final draft materials of workshops under autumn assessment to Education Officer for review. Education officer, in consultation with the EPDC, may propose changes to the materials.
-14 <i>Jul</i>	Education Officer finalizes the autumn workshop programme.
-13 <i>Aug</i>	Workshop leaders finalize materials and send personal summaries, abstracts, pre-workshop assignments and needs analysis questionnaires to EMWA head office
-11 <i>Aug</i>	Autumn conference brochures are printed (or made available electronically) and distributed.
-9 <i>Sep</i>	Workshop registration opens. EMWA head office provides registrants with workshop materials on an ongoing basis.
-4 <i>Oct</i>	Workshop registration closes. EMWA head office sends participant list forms to workshop leaders that list workshop registrants and their EPDP enrollment status.
-2 <i>Oct</i>	Participants provide the completed pre-workshop assignment and needs analysis questionnaire to workshop leaders (who may set an earlier deadline but make exceptions for late registrants). Last date for new workshop leaders to submit final draft versions of presentation materials, handouts and post-workshop assignments to the EPDC, which may still request final revisions before the conference.
<b>0</b> <i>Nov</i>	<b>THE AUTUMN CONFERENCE</b>
+6 <i>Dec</i>	Participants provide the completed post-workshop assignment to workshop leaders. Some workshop leaders may set earlier or later deadlines.
+10 <i>Jan</i>	Workshop leaders return marked assignments and any additional material (e.g. list of correct answers) to participants (e-mail) or EMWA head office (paper). They return the completed participant list forms to EMWA head office, or email head office with the credit status of each participant.
+12 <i>Feb</i>	EMWA head office forwards the statement of credits to participants, together with the marked homework, if applicable. Participants eligible for certification receive their certificate in the following weeks.

## 6. ***Train-the-Trainer Forum***



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In addition to the train-the-trainer forum, a *workshop leaders forum* was introduced into the EMWA conference programme in 2003. This forum is open to all workshop leaders and prospective workshop leaders, and is designed to bring workshop leaders together with the EPDC in an informal setting, to share experience with the operation of the workshop programme and make suggestions for improving it.

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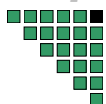
This forum takes the form of three-hour workshops that are provided at intervals to all workshop leaders free of charge. The forum aims to optimise the training skills of new workshop leaders and is a cornerstone of the quality assurance measures built into the EPDP. Workshop leaders who are recognised as skilled trainers and presenters outside EMWA will also be invited to the forum so that less experienced trainers will have the opportunity of benefiting from their knowledge and experience.

The workshops broadly follow the EPDP format, with a pre-workshop assignment, training session, and post-workshop assignment. The following topics are covered:

- ensuring coherence between different elements of the workshop
- providing smooth interfaces between different sections of the training session (Figure 1)
- enhancing training skills, including how to create and maintain a participant-centred environment, transfer expertise, elicit active participation, and manage time
- producing audience-friendly visual aids
- applying the above to the workshop leader's own workshop

If two people share the role of leader, they will both be invited to attend this training together.

## 7. Expenses



The most recent version of the EMWA reimbursement policy (August 2008) is appended to this Handbook, and gives full details of the procedure for claiming expenses and the type of expenses that can be claimed.

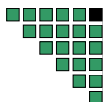
This excerpt from the reimbursement policy gives an overview of the entitlement according to the contribution made by the workshop leader (or other person):

1st activity 2nd activity	Full WS or seminar (≥3hr)	Short WS or seminar (1.5hr)	EC, EPDC Committee	Panel member	Invited Speaker
No other activity	C	B	C	A	B
Full WS or seminar	E	D	E	D	C
Short WS or seminar	D	C	D	C	C
EC, EPDC Committee	E	D	E	C	Not applicable
Panel	D	C	C	A	C

- A Travel expenses\* **OR** full registration
- B Travel expenses\*, registration fee for the day of the event, 1 night accommodation
- C Travel expenses\*, full registration fee, 2 nights accommodation
- D Travel expenses\*, full registration fee, 3 or 4 nights accommodation (depending on timetabling of the events)
- E Travel expenses\*, full registration fee, 4 nights accommodation

\*See reimbursement policy for details of travel expenses that can be claimed.

## 8. Templates



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The templates are available on the EMWA website as Word documents for use directly by workshop leaders.

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The templates on the following pages should be used for preparation of the abstract, the workshop outline, the needs analysis questionnaire, the pre-workshop assignment, the post-workshop assignment, and the workshop leader personal summary. A checklist is also provided and workshop leaders are requested to complete this and send it with the other material to the EPDC during workshop assessment, to help ensure that the package is complete.

The templates include instructions for completion and are mostly self-explanatory. Sections requiring completion are given in square brackets [...]. Any instructions contained in square brackets, and the brackets themselves, must be deleted and replaced by freely composed text.

Below the workshop title, the option allocation (Drug Development, Language and Writing, Medical Communication, Medical Science, Professional Techniques) and level (Foundation or Advanced) must be given. If the workshop is not intended for credit, then “Not for credit” should be stated. For workshops under assessment “Under assessment” will suffice if the level and option are not yet decided. The planned duration of the workshop (3 or 3.5 hours) should be given if possible. If this is part of full day workshop in two parts, this can also be mentioned.

Workshop leaders should include their affiliation after their name, i.e. the name of the company they work for, or “freelance” if they are freelance (or if they do not wish the company name to appear in the conference brochure or other published material).

The **abstract** is prepared for the conference brochure and has a maximum limit of 250 words. When writing the abstract, particular care must be given to ensuring that the intended participants are addressed. If not, participant expectations may not be met and this will be reflected in low scores on the workshop evaluation forms. Workshop leaders are advised always to submit their most recent abstract each time a conference brochure is printed.

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The **workshop outline** is prepared for the EPDC as part of the workshop approval process. The outline will help to ensure that the different elements of the workshop form a coherent package. It may be prepared well in advance of the abstract if there is no urgency regarding the conference brochure, or the reverse may be the case (see section 4). The workshop outline includes more detail on workshop content and timing than will appear in the abstract, but other elements overlap and can be copied from one to the other document, whichever is prepared first.

The function of the **needs analysis questionnaire** is described in section 2. The table provided on the template is recommended; if it is used, the number of rows should be adjusted as appropriate.

Information from the **workshop leader personal summary** will be included on the website and in the conference brochures for those workshop leaders presenting workshops at that particular conference.

### ***Estimated times for completion of pre- and post-workshop assignments***

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The templates require times for completion the pre-workshop and post-workshop assignments. The EPDP brochure and each conference brochure include the following text:

*Note that the times required to complete the pre-workshop and post-workshop assignments are provided as a general guide only, and individual participants may require substantially more or less time depending on their experience.*

It is therefore unnecessary to provide a time range (e.g. “2–3 hours”) or qualify the specified times with “not more than”, “approximately” or something similar. Please specify a single time for the pre-workshop assignment (usually 2 hours or less), and a single value for the post-workshop assignment (usually 3 hours or less). A whole number of hours is preferable in each case, though times to the nearest half hour may be specified.

EMWA Professional Development Programme

**[Workshop title]**

**[Option, level, and planned time]**

**[Name and affiliation of workshop leader(s)]**

<b>Checklist</b>
------------------

[Before sending your workshop materials to the EPDC for assessment, please tick the boxes to confirm that you have included the relevant component]

Abstract	<input type="checkbox"/>
Workshop outline	<input type="checkbox"/>
Needs analysis questionnaire	<input type="checkbox"/>
Pre-workshop assignment	<input type="checkbox"/>
Post-workshop assignment	<input type="checkbox"/>
Workshop slides, acetates or other material	<input type="checkbox"/>
Workshop handouts	<input type="checkbox"/>
Materials for assignments	<input type="checkbox"/>
Workshop leader personal summary	<input type="checkbox"/>

Please provide your contact details (e-mail, phone and fax numbers) here.

---

EMWA Professional Development Programme

**[Workshop title]**

**[Option, level, and planned time]**

**[Name and affiliation of workshop leader(s)]**

<b>Abstract</b>
-----------------

**Participant profile**

[Describe who will benefit from this workshop in the light of the objectives. Mention any prerequisites, e.g., other workshops that should have been taken. State whether this workshop should be completed before attending another workshop.]

**Objective**

[State why the workshop corresponds to medical writers' needs in this field and describe the knowledge and skills that participants will acquire.]

**Workshop content**

[Describe how the objective will be achieved and what will be involved.]

**Pre-workshop assignment**

[Give time required to complete the assignment.]

**Post-workshop assignment**

[Give time required to complete the assignment.]

*[Abstracts must not exceed 250 words]*

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EMWA Professional Development Programme

**[Workshop title]**

**[Option, level, and planned time]**

**[Name and affiliation of workshop leader(s)]**

<b>Workshop outline</b>
-------------------------

**Participant profile**

[Describe who will benefit from this workshop in the light of the objectives. Mention any prerequisites, e.g., other workshops that should have been taken. State whether this workshop should be completed before attending another workshop.]

**Objective**

[State why the workshop corresponds to medical writers' needs in this field and describe the knowledge and skills that participants will acquire.]

**Workshop content**

[Describe how the objective will be achieved and what will be involved. Include full details of the time allocated to each part of the workshop: getting started, different presentation topics and exercises, conclusions, briefing for the post-workshop assignment and completion of evaluation forms; a table such as the one below will generally be helpful: see Figure 1 in this Handbook for a more detailed explanation.]

<b>Content</b>	<b>Time</b>	<b>Comments</b>
Getting started		Include time for addressing the NAQ and comments on the pre-workshop assignments
Topics		Repeat this row as needed
Group activities		Repeat this row as needed
Break	20 mins	
Topics		Repeat this row as needed
Group activities		Repeat with row as needed
Conclusions and post-workshop assignment		
Evaluations	10 mins	
<b>Total time</b>		

**Pre-workshop assignment**

[Give time required to complete the assignment.]

**Post-workshop assignment**

[Give time required to complete the assignment.]

---

EMWA Professional Development Programme

**[Workshop title]**

**[Option, level, and planned time]**

**[Name and affiliation of workshop leader(s)]**

<b>Needs analysis questionnaire</b>
-------------------------------------

To ensure that the workshop corresponds to your needs, please complete this questionnaire together with the pre-workshop assignment.

**Name**

**Current job**

**How much experience do you have [specify area(s) dealt with by the workshop]?**

**Do you have any other relevant experience?**

**Are you attending this workshop to get credit towards your certificate?**

**Yes:**

**No:**

**Undecided:**

**Which three questions would you most like to see answered during the workshop? (Questions must be within the scope of the workshop as described in the Abstract.)**

**Please rate each topic in terms of its importance to you. As far as possible, time during the workshop will be allocated to the items with the highest scores.**

1 = I do not want much time on this    2 = I need some time on this    3 = I need lots of time on this

Topic	Score (tick appropriate box)		
	1	2	3

**Please return to [name of workshop leader] by [date].**

---

EMWA Professional Development Programme

**[Workshop title]**

**[Option, level, and planned time]**

**[Name and affiliation of workshop leader(s)]**

<b>Pre-workshop assignment</b>
--------------------------------

**Objective**

[State the objective of the assignment.]

**Content**

[State the content of the assignment.]

**Assessment criteria**

[Ensure that participants wishing to take the workshop for credit understand what they must achieve to qualify for credit. Describe how any exercises will be assessed. Explain how knowledge acquired from the assignment will be applied during the workshop.]

**Instructions**

[Provide clear and precise instructions. Give deadlines and the address (post, fax, or e-mail) for the return of any exercises.]

**Resources and materials**

[Describe the resources and material required to complete the assignment.]

**Time required**

[Give time required to complete the assignment.]

EMWA Professional Development Programme

**[Workshop title]**

**[Option, level, and planned time]**

**[Name and affiliation of workshop leader(s)]**

<b>Post-workshop assignment</b>
---------------------------------

**Objective**

[State the objective of the assignment.]

**Content**

[State the content of the assignment.]

**Assessment criteria**

[Explain the link to the workshop content and the criteria that will be used to assess the assignment. State the achievement level required to qualify for credit.]

**Instructions**

[Provide clear and precise instructions. Give deadlines and the address (post, fax, or e-mail) for the return of the completed assignments.]

**Resources and materials**

[Describe the resources and material required to complete the assignment.]

**Time required**

[Give time required to complete the assignment.]

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EMWA Professional Development Programme

<b>Workshop leader personal summary</b>
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**Name**

[Provide your title, name and qualifications as you wish them to appear in the EPDP brochure and the conference brochure.]

**Brief summary**

[Write a brief summary to introduce yourself to your audience. Details can include present employment, previous employment, previous teaching experience, and any other relevant information. This summary should be a single paragraph of two to three sentences, not more than 140 words in total and written in the third person. It should be written in the third person. See the personal summaries presented in recent EMWA conference programmes for guidance on style and content.]

***Appendix:  
EMWA Volunteer Reimbursement Policy***

## Volunteer Reimbursement

Last Revised: 26 August 2008

Policy 4.3

### Policy:

#### Expenses

Defined as costs incurred by any EMWA volunteer, contracted partners or invited person while conducting official EMWA, planned, budgeted or especially agreed business.

### Procedure:

#### Reimbursement

Happens when expenses incurred are first paid by the entitled and officially claimed from the EMWA Head Office. This Reimbursement Policy addresses the handling of all expenses incurred for and during official EMWA business and methods to cover these expenses.

#### Expense Claims

Require the use of an official EMWA expense claim form (available only from the EMWA Head Office) to show expenses incurred and supported by original receipts or other suitable proof of expense. All expenses should be clearly outlined on an expense claim form stating the date, the purpose, the various items, the currency and the amounts.

#### Entitlement

Entitled to receive compensation and reimbursement of expenses from the Association are:

1. Executive Committee (EC) members and EMWA Professional Development Committee (EPDC) members.
2. Chairmen and members of project groups and sub-committees approved by the EC.
3. Workshop Leaders, seminar leaders, panel members and other VIPs invited to the Conference under special regulation.
4. Professionals and service providers who have reimbursement of detailed expenses agreed in the contract.

#### Specification

Expenses are reimbursable or will be covered by the Association when:

1. A detailed activity plan of a project group, committee, or an individual volunteer and budget was approved by the EC.
2. Out of and excess of budget issues were submitted beforehand and approved in writing by the Treasurer.

#### Deadline for Reimbursement

All expense claims in connection with activities are to be submitted within eight weeks of the meeting or of the activity incurring the cost.

## Volunteer Reimbursement

Last Revised: 26 August 2008

Policy 4.3

### Reimbursement

The expense claim to which a person is entitled depends on their contribution to a conference, and is outlined in the following matrix.

1st activity 2nd activity	Full WS or seminar (≥3hr)	Short WS or seminar (1.5hr)	EC, EPDC Committee	Panel member	Invited Speaker
No other activity	C	B	C	A	B
Full WS or seminar	E	D	E	D	C
Short WS or seminar	D	C	D	C	C
EC, EPDC Committee	E	D	E	C	Not applicable
Panel	D	C	C	A	C

### Claim Entitlement

- A Travel expenses\* **OR** full registration
- B Travel expenses\*, registration fee for the day of the event, 1 night accommodation
- C Travel expenses\*, full registration fee, 2 nights accommodation
- D Travel expenses\*, full registration fee, 3 or 4 nights accommodation (depending on timetabling of the events)
- E Travel expenses\*, full registration fee, 4 nights accommodation

Note: The maximum number of night's accommodation possible is 4 at a spring conference and 2 at an autumn conference.

### \* Travel Expenses

1. **Plane/Train** – The cheapest rate applicable, where in line with your schedule, (Apex or non-flexible ticket) must be booked whenever possible. Private "air miles" used instead of a paid ticket will not be reimbursed. Prior to the conference, volunteers will be requested to submit an estimate of their expenses to the EMWA Head Office. This will state a maximum amount that will be paid for travel to that conference. For amounts over and above this, approval from the Treasurer must be received before tickets are purchased.
2. In special cases or urgent matters when a change of booking or travel is unavoidable and results in an increase in the price paid, the entitled will contact the Treasurer and the EMWA Head Office to find the best solution.

## Volunteer Reimbursement

Last Revised: 26 August 2008

Policy 4.3

3. **Private Car** – The compensation is Euro 0.28 per km. The kilometre rate covers highway fees, eventual car repair and all other kinds of maintenance and assistance occurring during travel if not especially approved by the Treasurer.
4. The entitled is expected to use public transport for longer distances. If the use of a private car exceeds the price of an Apex (economy) return air ticket plus access to and from the airport using public transportation or taxi (see next paragraph for use of taxis), the price of the air ticket plus airport access expenses will be reimbursed instead.
5. **Taxi** – Whenever possible taxis should be shared. Costs for taxis from home to the airport or train station and return or to the venue and return exceeding Euro 50.00 for a single trip must be approved by the Treasurer before the journey.
6. **Car Rental** – Rental must be approved by the Treasurer beforehand (see private car).
7. **Public Transport** – The price of the public transport ticket (bus and second class train fare) will be reimbursed.
8. **Parking** – Fees will be reimbursed if use of public transport is not possible or not appropriate (see private car).

### Accommodation

Hotel accommodation is generally arranged and booked by the EMWA Head Office.

### Expenses not reimbursed

Only those expenses detailed above shall be reimbursed. The following expenses will expressly not be reimbursed:

1. Hotel mini-bar.
2. Private telephone calls (in hotels or otherwise).
3. Spirits, cocktails and drinks at the bar.
4. Meals during meetings or conferences for EMWA volunteers.
5. Meals with the exception of those for contracted partners or invited persons while conducting official EMWA, planned, budgeted or especially agreed business.
6. Entertainment.

### Payments

#### Currencies

The expenses should be listed in the currency in which they were generated.

#### Approval and Payment

All expenses and claims will be checked and approved by the Treasurer.

All costs will be reimbursed after submission of the completed expense claim forms. These must be sent to the EMWA Head Office together with the original receipts or other suitable proof of expense.

As a matter of course, expense claims from volunteers will be checked and verified by the EMWA Head Office. All problems and questions will be queried with the Treasurer.

The EMWA Head Office will process expenses and will arrange reimbursement of approved expenses within two weeks of receipt.

## **Volunteer Reimbursement**

**Last Revised: 26 August 2008**

**Policy 4.3**

Reimbursement will be made by cheque or bank transfer from international bank accounts if not agreed differently beforehand.

No expenses may be paid from one volunteer to another volunteer without the express permission of the Treasurer or the EMWA Head Office.

No responsible volunteer or professional managing an EMWA bank account may pay expense claims to his or her private account without the express permission of the Treasurer or the EMWA Head Office.

### **Pre-payments**

Direct payment of invoices issued for approved activities is possible through the EMWA Head Office of the Association or following permission of the Treasurer from an indicated account.

### **Special Case**

In the case that a third party agrees to cover part or the full amount of costs that are prepaid or reimbursed for official activities (travel, accommodation, delegate fees and others), the EMWA Head Office will invoice the third party for the justified amount. The third party will be asked to send the money to an account indicated by the EMWA Head Office.