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EMWA Professional Development Programme – EPDP

# Workshop Leaders Handbook

2023 (1<sup>st</sup> edition 2017, revised September 2019 and September 2023)

*Handbook preparation: EMWA Professional Development Committee (EPDC)*

Thank you for your interest in developing and running an EMWA workshop! Whether you are a new or an experienced workshop leader, we encourage you to read and use this handbook while developing and updating your workshop. If you have questions or comments about the handbook or the documents referred to within it, or would like to discuss anything about your workshop, feel free to contact the Education Officer or another EPDC member. For matters of conference administration, the EMWA Head Office team will be happy to help you.

*Email: [education@emwa.org](mailto:education@emwa.org)*

## **Version history**

This edition was issued in December 2017.

V1.1 was issued September 2019, with minor changes, including reference to workshop development timelines and information about workshop leader experience.

V2.0 was issued September 2023, with minor changes, including reference to guidance about slide development.

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## ***List of templates, checklists and guidance***

### ***Workshop content and material***

The documents listed below are available on the training page of the [EMWA website](#).

**Template – Workshop proposal form**

**Checklist – Developing a workshop timeline**

**Checklist – Material to submit for a new workshop**

**Template – Abstract**

**Template – Workshop leader biography**

**Template – Workshop outline**

**Template – Preworkshop assignment**

**Template – Postworkshop assignment**

### ***Conference checklists***

**Checklist – What to do before the conference**

**Checklist – What to do during and after the conference**

### ***Guidance on slide development***

## **1. Introduction**

The **EMWA Professional Development Programme** (EPDP) provides training for medical writers through workshops, webinars, expert discussion groups (EDG) and homework assignments. High-quality of the training is ensured through well-qualified committed workshop leaders, and rigorous quality assurance procedures that form the basis for the EMWA certificates and professional development credits (see the EPDP brochure). Our aim is that the medical writing community, employers and clients regard EMWA as their preferred provider of training for medical writers.

This handbook is a practical guide for new and existing workshop leaders. It defines the format, standards and quality management process for EPDP workshops and describes the procedures for developing and running them. It does not apply to non-EPDP workshops and seminars. You will find other useful information for workshop leaders on the **[Training section of the EMWA website](#)**.

All EPDP workshops are assessed, approved and monitored by the EPDC, chaired by the Education Officer (who is also a member of the EMWA Executive Committee).

Details about the EPDP can be found in the EPDP brochure, which includes a full list of available workshops, and explanations of workshop levels, subject areas as well as how to gain credit and receive certificates.

## **2. Developing and running workshops**

The EPDC welcomes proposals from EMWA members for potential new workshops. A workshop leader must have experience of and actually work in the field of the topic for their workshop. Generally, a new workshop leader should have attended at least three EMWA workshops before they develop a workshop of their own.

Please use the [Workshop Proposal Form](#) when you submit new proposals. EMWA workshops are the intellectual property of the person who develops them. Note that you are *not* asked to assign them to EMWA.

Workshops should not be promotional. EMWA allows workshop leaders to have a company name and a logo on the first workshop slide, but does not allow promotional-type content in handouts (e.g. company URLs, images, brochures, pens).

A freelancers' table is set up at every conference, where promotional material can be displayed throughout the conference. Contact Head Office for details of opportunities to distribute company literature (e.g. delegate bag inserts).

The [EMWA reimbursement policy](#) gives full details of the procedure for claiming expenses as a workshop leader and the type of expenses that can be claimed.

### ***Workshop format***

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Workshops are interactive training sessions and not simply lectures.

Yet, EMWA workshops take many forms; some are mainly presentations of information, while others include extensive group exercises. At a more advanced level, some subjects may be suited to the *master class* format, where a small group of participants receive intensive guidance from the instructors while undertaking practical assignments. Large topics may need to be divided into two stand-alone

workshops (either at the same level or as one foundation and one advanced) or as a double (all-day) workshop.

EMWA workshops have the following three elements:

- Pre-workshop assignment
- Workshop presentation
- Post-workshop assignment

### ***Developing a new workshop***

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The EPDC will review your workshop proposal, and if it is accepted you will be assigned an EPDC liaison/mentor who will help you develop the workshop according to EMWA format and standards, and coordinate its review and approval. A non-EPDC person may be appointed as a mentor if more competence on the subject is needed than that within the committee. Your mentor will guide you through the process of submitting materials and information to Head Office and meeting deadlines. The EPDC support, observation and approval of new workshops are described further in [Quality Assurance Procedures](#).

Workshop leaders should decide in conjunction with the EPDC whether a new workshop is more suited to the advanced or foundation level. Advanced level workshops have fewer participants and therefore enable more intense and interactive sessions; a lower limit for number of participants may also be appropriate for some other workshops, at the discretion of the EPDC.

The following materials are required for a workshop:

- Abstract
- Workshop leader biography
- Workshop outline
- Workshop slides
- Any other material to be used during the workshop

- Pre-workshop assignment
- Post-workshop assignment

Figure 1 is a guide to allocating time during the workshop.

<b>Content</b>		<b>Time</b>
<b>Getting started</b>		<b>10 min</b>
<b>Content I</b>	<b>I</b>	} <b>70 min</b>
	<b>A</b>	
<b>Content II</b>	<b>I</b>	
	<b>A</b>	
<b>Summary and preview</b>		
<b>BREAK</b>		
<b>Content III</b>	<b>I</b>	} <b>70 min</b>
	<b>A</b>	
<b>Content IV</b>	<b>I</b>	
	<b>A</b>	
<b>Conclusion and post-workshop assignment</b>		
<b>Evaluations</b>		

**3 hours** }

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

Experience shows that workshop leaders often overestimate what can be covered in the available time. Think about how many slides are appropriate for the time allocated for each topic (refer to guidance on slide development).

Exercises and group activities are strongly recommended. Having two group exercises, one in each half, works well. Be sure to allocate enough time for getting started and for discussion of the exercises, including feedback from the groups on their answers and your own comments. Some participants may have valuable knowledge, and should be encouraged to share it as appropriate. You should gather information about their experience within the preworkshop assignment, so you can put together groups with varied experience and ideally tailor the workshop to level of experience. Questions and discussion should be actively encouraged, and time should be allocated for some unplanned issues. So, the workshop leader's role may be to



facilitate knowledge exchange between the participants, as well as to teach. However, you need to make sure that participants do not take you too far off the topic or that one or more participants do not dominate a discussion.

If you are presenting an advanced workshop, you should focus on content suitable for that level. For a workshop at that level, leaders should not spend time responding to the needs of inexperienced participants. If an inexperienced participant asks basic questions, you can say that you will address their questions afterwards or tell them where they can look up the information. In your description of participants in the abstract for the workshop, include something about expected level of experience.

Make sure to integrate the **pre-workshop assignment** with the workshop. For reading assignments, this can simply be referral to the documents read and a brief summary of key points. If the assignment was an exercise, you should discuss the exercise, at least briefly. For some workshops, discussion of the pre-workshop assignment is a major part of the content. However you do it, ensure that participants feel their effort has been noticed and that they benefit from having done the assignment. Some time must be reserved during the workshop to explain the **post-workshop assignment**. This should include the assessment criteria and the deadline for submitting it.

Note that most conference venues are now set up for 16:9 rather than 4:3 aspect ratio.

Consider marking the opening slide and the first page of any handouts with your name and © (copyright symbol), stating that the whole presentation is copyright. Note that a copyright usually applies to the individual workshop leader(s) and does not signify copyright of the workshop leader's company.

## ***Preparing for the workshop***

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Before each conference, all workshop leaders will be asked about their availability to present one or more of their current workshops. The EPDC will thereafter put together a conference workshop programme.

If one or more of your workshops are included in the draft programme, EMWA will request you to confirm that you can run the workshop in the slot(s) assigned. You will later receive an email from Head Office with timelines for submission of information and materials.

EMWA's Head Office needs your response to this email, and that you send your materials by the deadlines provided to ensure smooth running of your workshop and the conference overall. You can use the checklist [What to do before the conference](#) to keep track of your progress and timelines before arriving at the conference. Book your travel in due time before the conference, and complete the accommodation form in time if you wish to stay at the conference hotel.

## ***Running a workshop***

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For first-time workshop leaders, your mentor will be happy to support you on the day with setting up the room, etc. Please feel free to ask!

See the checklist [What to do during and after the conference](#) for what to remember while you set up and run your workshop and the information to hand in at the EMWA desk shortly afterwards.

Avoid passing around a list of attendance for people to check off, but rather take a roll call or check in people as they arrive to ensure that no additional unregistered attendees are present or someone is signed off who are not there. Note any no-shows and very late arrivals on the attendance list that is returned to the EMWA desk with the evaluation forms at the end of the workshop. Someone who misses more than 30 min of the workshop (e.g. arriving late) should not receive credit for the workshop (see [Workshop attendance](#)). Please don't refuse people entry if they arrive late, but do

not spend time recapping. If they arrive during an exercise, briefly explain the exercise to them individually and place them in a group, rather than making them sit out the exercise.

At the beginning of the workshop, describe clearly to the participants what the learning objectives are. You should respect the time allocated for your workshop and the times for refreshment breaks, which are provided in the brochure for each conference. Ensure enough time for the refreshment break(s) (15–20 min) and incorporate such breaks into your workshop plan. For many participants, networking in breaks are an important part of the conference.

At the end of the workshop, don't forget to hand in your completed participant list and evaluation forms to the EMWA desk.

## **3. Workshop assignments, attendance and credit**

EMWA's does not wish to act as an *examination board*, but rather to support and guide members through their professional development. However, it would devalue the EMWA certificate and be unfair to successful candidates if credit were to be awarded in all cases regardless of individual performance.

To gain credit, participants must:

- Complete the pre-workshop assignment *before* the workshop.
- Attend the workshop *in full* (see [Workshop attendance](#) below).
- Successfully complete the post-workshop assignment within the allotted time.

Leaders are not expected to send out reminders about assignments, but please do acknowledge receipt to avoid confusion about assignments going astray. Participants are instructed to contact workshop leaders if they do not receive acknowledgement of receipt as it is their responsibility to ensure that their assignments reach the workshop leader.

### ***Pre-workshop assignment***

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Participants are expected to do a pre-workshop assignment that is appropriate for the workshop. The format you choose depends on the objectives and content of your workshop. A pre-workshop assignment could be reading, writing some text, or answering questions on the topic. It could also be used to help you find out about the experience of the participants and what questions they would like addressed in the workshop. Some workshop leaders use the pre-workshop assignment responses to provide examples for discussion in the workshop or to compare with the post-workshop assignment to assess learning. Your mentor can help you develop an appropriate pre-workshop assignment.

The pre-workshop assignment will be made available to download from the website with the conference programme. If your assignment requires a response from

participants before the workshop, set a deadline for sending the assignment that allows you enough time to use the responses to finalise the workshop. However, because we allow late registration for the conference, we ask workshop leaders to accept all assignments for credit, provided they are submitted *before* the workshop. This does not mean that you are expected to include information from late assignments in your workshop materials. Submitting the pre-workshop assignment *after* the workshop is not allowable for obtaining credit.

### ***Workshop attendance***

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Participants must attend the workshop to be eligible to gain credit. Participants who miss more than 30 min of instructional time (by arriving late, leaving early or leaving the room for a long period) are not eligible to receive credit.

### ***Post-workshop assignment and feedback***

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Towards the end of your workshop, you should hand out the post-workshop assignment or discuss its content, and tell participants that you will send the assignment by email shortly after the conference. You should also provide the deadline for receiving post-workshop assignments and the criteria used for assessment and award of credit.

Workshop leaders should provide feedback to participants on the content of their post-workshop assignment and inform them whether they will be awarded credit. Head Office also informs participants by email when their credit information has been updated online. Post-workshop assignment feedback may be in the form of model answers or a summary distributed to everyone, or brief individual comments on the participant's work. This may depend on your personal preference as well as the number of workshop participants.

If a participant does not meet the assessment criteria for the assignment first time around, please give them the chance to resubmit it if they wish to gain credit. However, if the assignment is still not satisfactory you should inform them that you cannot award credit.

If in doubt about what to do in a particular case, please discuss it with the Education Officer.

## **4. Quality Assurance Procedures**

Workshops are evaluated in several ways: by the EPDC during their development and on an ongoing basis, as well as by participants at the end of each workshop.

### ***EPDC review of new workshop proposals***

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The EPDC reviews all proposals for new workshops and considers how they fill a gap, complement or overlap other workshops in the current EPDP. They will also advise (provisionally) on the category and level of a new workshop.

If your proposal is accepted by the EDPC you will be assigned an EPDC liaison/mentor or an experienced workshop leader outside of the EPDC – irrespective of how much experience you have – who will provide you with the support needed during development of the workshop (for further details see [Developing a new workshop](#)).

### ***Mentors***

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They will explain the process for the development, review and finalisation of your new workshop

You will be required to keep your mentor informed of your progress and submit materials for them to review. Everyone benefits from an objective review, including experienced workshop leaders and EDPC members. While the input from your appointed contact person is generally in the form of advice rather than correction, you are expected to take on board their input in a constructive manner.

You and your contact will decide on deadlines for submitting material for review and approval of your new workshop, based on timing of the first conference. See the

following section, [EPDC review of new workshop material](#), for details of material required.

## ***EPDC review of new workshop material***

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Before a workshop is run for the first time, the workshop leader (one contact person if more than one leader) must submit the final draft materials for review by the EPDC. The materials required are detailed in the checklist [Material to submit for a new workshop](#). Your mentor will generally advise when the materials are appropriate for submitting to the EPDC.

## ***Observance and continuing assessment***

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The first time a new workshop is presented, it is assessed by two observers, even if the leader already runs other EMWA workshops or is a member of the EPDC. One observer will generally be the mentor assigned to the workshop. The others may be another EPDC member or another experienced workshop leader. The observers will take notes during the workshop and will arrange a time to meet you afterwards to give feedback. Don't feel pressurised by this; the workshop observation process is supportive and constructive, and observers are there to provide positive feedback as well as to help you think of ways that the workshop could be improved (the first running of any course is always a learning curve, even for experienced trainers). The observers will report back to the EPDC when it meets at the end of the conference. The evaluation forms from participants, from all workshops, are checked by members of the EPDC during the conference.

***The EPDC may also delegate observers to attend approved workshops on an ad hoc basis. If this is the case we will tell you beforehand.***

### ***Approval of new workshops***

The EPDC reviews observer comments and participant evaluations from the workshop. The workshop may be approved with no or minor changes, or approved with more major changes, or (rarely) not approved. If the EPDC has asked for major



changes, your mentor will support you in making the revisions and usually an observer will sit in again the next time the workshop is run.

### ***Evaluation by participants***

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Workshop evaluation by participants (scores and comments) is an essential part of the EPDP. Evaluation forms will be placed in the room before you start your workshop and should be distributed to participants before the end of the workshop. Encourage participants to complete the forms. *Please collect the forms at the end of the workshop, put them in the envelope provided, and hand them in to the EMWA desk as soon as you can after the workshop. Remember also to put the attendance list in the envelope.*

As long as most evaluations are positive, don't be alarmed by one or two negative comments. It is not possible to please everyone all the time. If the EPDC have any concerns, they will contact you to discuss how best to address them. Head Office will send you a scanned copy of your evaluation forms after the conference; these provide valuable feedback so please do take time to review and learn from them.

### ***Requirement to keep workshops up-to-date***

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Workshop leaders must keep their materials up-to-date. If you make major changes to a workshop, please notify the EPDC by submitting a new **workshop outline** and a new **abstract** for the conference brochure. (Use the forms on the [training page](#).) The Education Officer or another member of the EPDC will be happy to discuss changes that you are thinking of making and whether a new outline is necessary.



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