



PAN AMERICAN HEALTH ORGANIZATION
WORLD HEALTH ORGANIZATION



150th SESSION OF THE EXECUTIVE COMMITTEE

Washington, D.C., USA, 18-22 June 2012

Provisional Agenda Item 4.10

CE150/20, Rev. 1 (Eng.)
23 May 2012
ORIGINAL: ENGLISH

EXPANDED TEXTBOOK AND INSTRUCTIONAL MATERIALS PROGRAM (PALTEX)

Introduction

1. The Expanded Textbook and Instructional Materials Program (PALTEX) was established by the Pan American Health Organization (PAHO) in the mid 1960s as a technical cooperation program aimed at improving the quality of health science educational processes in Latin America. PALTEX is a publishing program that acquires, produces, and distributes quality textbooks and instructional materials in Spanish and Portuguese at affordable prices.
2. The overall objective of PALTEX is to improve the quality and impact of education—both basic and continuing—by providing students and health workers with educational materials that are pertinent, accessible, and up-to-date. Since 1968, PAHO and the Pan American Health and Education Foundation (PAHEF) have jointly administered the program.
3. Despite its success, in recent years PALTEX has faced a number of challenges stemming from the joint administration arrangements with PAHEF, to the point that PALTEX services, organization, funding and technical integrity may have been at risk.
4. In response to this situation, the Director of the Pan American Sanitary Bureau (PASB) has taken action to transfer overall management of PALTEX back to PAHO, including all aspects related to its administration, inventory, procurement, and finance.
5. This document presents a report of the current situation, identifying key issues, providing information on actions taken, and seeking the approval of the Executive Committee as we move forward to strengthen and renew PALTEX.

Background

6. Educating and training health workers has always been a high priority for PAHO. In addition to being concerned with developing training programs and educational methodology, PAHO also has had a long-term interest in preparing and providing instructional materials that health personnel require as a part of their learning process.

7. In 1966, the 17th Pan American Sanitary Conference, through Resolution CSP17.R15, established a program for the supply of medical textbooks as a PAHO technical cooperation strategy to support and improve the quality of medical education in Latin America by promoting the use of the best textbooks available.

8. In 1968 PAHO began negotiations with the Inter-American Development Bank (IDB) to obtain a loan in support its medical textbook program. That same year PAHO also promoted the establishment of PAHEF as an independent, nongovernmental organization incorporated in the District of Columbia in order to support PAHO. In 1971 PAHEF received the IDB loan for the Medical Textbook Program.

9. Simultaneously, PAHO entered into bilateral agreements with its Member States to permit the operation of the program as a PAHO technical cooperation activity in those countries. PAHO also entered into agreements with universities, health services, and other institutions at the country level for the sale and distribution of the program's books and medical instruments to students and health workers.

10. In 1979, the IDB approved a second loan to support the program, including other health disciplines. Thereafter, the program became better known as the Expanded Textbook and Instructional Materials Program (PALTEX) (also herein referred to as "the Program").

11. Over time PALTEX grew as a PAHO technical cooperation program improving the quality and impact of education in the health sciences as well as training for health workers through the Americas. PALTEX entails the production, selection, and distribution of learning resources that are technically relevant and facilitate students' and health workers' access to knowledge and education. PALTEX is fully aligned with PAHO and WHO resolutions, priorities, and technical documents related to educational priorities for the health sciences and public health programs, as well as needs for in-service education and on-the-job training. PALTEX's key contributions have been as follows:

- (a) providing books and materials to help train the health workforce;
- (b) supporting the reorientation of health science education to address the Millennium Development Goals (MDGs), national priorities, health determinants, and the renewal of primary health care;

- (c) maintaining and validating PAHO/WHO's contributions to health education, both basic and in the social sciences;
- (d) providing support for technical education;
- (e) facilitating and enriching the development of permanent, continuous education for health personnel;
- (f) contributing to the renewal and development of public health education;
- (g) providing health service and health education personnel with rapidly accessible, high-quality source materials for reference; and
- (h) contributing to strengthening PAHO/WHO's values and image and to bringing them to every corner of the Region.

12. Under the current administrative arrangements at the regional level, PAHO's Health Systems based on Primary Health Care/Human Resources for Health entity had under its responsibility the Program's technical, administrative, operational, and editorial aspects, while PAHEF has been responsible for inventory, procurement and servicing of the IDB loans.

13. PALTEX currently serves 19 PAHO Member States¹ through a network of 530 distribution points located in universities, health services, and ministries of health, PAHO/WHO Representative Offices (PWRs), and professional organizations. Through PALTEX PAHO has provided access to nearly 640 commercial publications, 90 PAHO publications, as well as 54 basic diagnostic medical and dental instruments. PALTEX has also provided educational resources for medicine, dentistry, nursing, veterinary medicine, primary health care, public health, and other areas.

14. Having sold more than 7 million learning resources over a period of 46 years, PALTEX has achieved success by offering affordable prices for textbooks. PAHO's technical cooperation program has contributed to furthering the education of millions of health students and professionals in the Americas. To date the ministers of health continue to renew their commitment to PALTEX as part of PAHO's technical mission.

Situation Analysis

15. Despite PALTEX's success, several difficulties emerged in recent years stemming from the Program's joint management arrangement with PAHEF. Some of these difficulties include:

¹ These Member States include: Argentina, Belize, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, El Salvador, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela (Bolivarian Republic of).

- (a) differences between PAHO and PAHEF concerning PALTEX's mission, strategic orientations and objectives, particularly its alignment with PAHOs' technical cooperation;
- (b) differences related to the ownership of the PALTEX brand;
- (c) differences in principles and criteria used for the selection of new instructional materials and textbooks;
- (d) issues related to PALTEX human resources assignment, responsibilities, and supervision, including communications with PWRs;
- (e) lack of financial clarity related to investments, reporting, and resource utilization; and
- (f) outdated legal frameworks between PAHO and PAHEF.

16. Most recently, the above situation reached a point where PALTEX's services, organization, and technical integrity may have been at risk—including financial matters related to investments, reporting, and resource utilization.

Action Taken

17. Given the above challenges, in December 2011 the Director of PASB made the decision to bring the overall management of PALTEX back to PAHO, including all aspects related to its administration, inventory, procurement, and finances.

18. A comprehensive dialogue was established with the Board of Directors of PAHEF; a road map was defined and a PAHO Task Force was established to implement the smooth and uninterrupted transfer of the entirety of PALTEX, including all of its assets, back to PAHO.

19. The transfer of the entirety of PALTEX back to PAHO includes: technical decisions and procedures; administration of inventory; physical location, functions, and supervision of all PALTEX personnel; communications with PWRs and member institutions; operational procedures; procurement procedures; and financial controls. This includes all decisions regarding PALTEX funds, and investments. Additionally, PAHEF has agreed to pay off the balance of the IDB PALTEX loan. The complete transfer of PALTEX back to PAHO is almost finalized as of the writing of this document.

20. Simultaneous to the transfer of PALTEX back to PAHO, PASB and the PAHEF Board of Directors have agreed to develop a new legal framework pursuant to which PAHEF may better support PAHO. This new legal relationship agreement is under negotiation and is due to be finalized in time for the 150th Session of the Executive Committee in June of 2012.

21. Now that PALTEX is being consolidated under full PAHO management, PASB is also defining a new model for the Program's structure and operations that will ensure its technical, administrative, operational, and financial integrity as well as providing for its sustainability.

22. Additionally, PASB is proposing a plan to expand and improve PALTEX to better meet country needs. This plan includes the following initiatives:

- (a) establishing a new technical selection system that will ensure the high quality and relevance of all learning resources incorporated into the PALTEX collection;
- (b) developing two new series:
 - Primary Health Care Renewal/Millennium Development Goals
 - Faculty Development;
- (c) expanding PALTEX into the English-speaking Caribbean, Cuba, Haiti, and Puerto Rico;
- (d) providing technical cooperation to the Regional Office for Africa (AFRO) and Regional Office for the Eastern Mediterranean (EMRO) as well as to other WHO Regions, upon request;
- (e) creating *e-PALTEX* by developing a broad, comprehensive digital and online component for learning resources based on educational priorities, and
- (f) increasing the number of participating member institutions across the Region.

Action by the Executive Committee

23. The Executive Committee is invited to review this report and consider the approval of the attached proposed Resolution (Annex A).

Annexes



PAN AMERICAN HEALTH ORGANIZATION
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150th SESSION OF THE EXECUTIVE COMMITTEE

Washington, D.C., USA, 18-22 June 2012

CE150/20, Rev. 1 (Eng.)
Annex A
ORIGINAL: ENGLISH

PROPOSED RESOLUTION

EXPANDED TEXTBOOK AND INSTRUCTIONAL MATERIALS PROGRAM (PALTEX)

THE 150th SESSION OF THE EXECUTIVE COMMITTEE,

Having reviewed the Director's report on the *Expanded Textbook and Instructional Materials Program (PALTEX)* (Document CE150/20, Rev. 1),

RESOLVES:

To recommend that the 28th Pan American Sanitary Conference adopt a resolution along the following lines:

THE 28th PAN AMERICAN SANITARY CONFERENCE,

Having considered the Director's report on the *Expanded Textbook and Instructional Materials Program (PALTEX)* (Document CSP28/__); and

Mindful of Resolution CSP17.R15 (1966) through which the 17th Pan American Sanitary Conference established a medical textbooks program as a PAHO technical cooperation program;

Considering the achievements and successes of PALTEX since its inception, improving the quality and impact of education in the health sciences by providing students and health workers throughout the Americas with educational materials that are pertinent, accessible, and up-to-date; and

Desiring to strengthen, expand and modernize PALTEX to better meet the needs of PAHO's Member States;

RESOLVES:

1. To take note of the above-mentioned report on PALTEX and actions taken to date by the Bureau.
2. To request the Director to:
 - (a) finalize actions necessary to consolidate overall management and administration of all aspects of PALTEX back to PAHO, including its assets, administration, operations, inventory, procurement, and finance;
 - (b) develop an improved structural and operational model for the Program under PAHO's comprehensive management and in accordance with PAHO regulations and rules, to ensure the Program's technical and financial integrity and provide for its sustainability;
 - (c) renew the technical components of PALTEX, including:
 - i. establishing a new technical selection system to ensure the high quality and relevance of learning resources incorporated into the PALTEX collection;
 - ii. developing two new series:
 - Primary Health Care Renewal/Millennium Development Goals, and
 - Faculty Development;
 - iii. expanding PALTEX to the English-speaking Caribbean, Cuba, Haiti, and Puerto Rico;
 - iv. upon request, providing technical cooperation to other WHO Regions, such as the Regional Office for Africa and the Regional Office for the Eastern Mediterranean;
 - v. creating *e-PALTEX* by developing a broad, comprehensive digital and online component for learning resources based on educational priorities;
 - vi. increasing the number of participating member institutions across the Region.



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Annex B

**Report on the Financial and Administrative Implications
for the Secretariat of the Proposed Resolution**

1. Agenda item: 4.10: Expanded Textbook and Instructional Materials Program (PALTEX)

2. Linkage to Program and Budget 2012-2013:

(a) Area of work:

This proposed resolution is linked to SO13:

To ensure an available, competent, responsive and productive health workforce to improve health outcomes

(b) Expected result:

RER13.04 of the PAHO Strategic Plan 2008-2012:

Member States supported through technical cooperation to strengthen education systems and strategies at the national level, with a view to develop and maintain health workers' competencies, centered on Primary Health Care.

3. Financial implications

(a) Total estimated cost for implementation over the lifecycle of the resolution (estimated to the nearest US\$ 10,000, including staff and activities):

PALTEX (also referred to as the "Program") operates with a revolving fund. All its operating costs, including salaries, are covered with the proceeds from Program sales. A PALTEX Program Management Advisor and an administrative assistant are needed; these positions will be included in the Program's budget. Since the Program is being transferred to PAHO effective 1 April 2012, an internal loan of US\$ 1 million has been allocated by the Director to re-start full PALTEX operations within PAHO and to be able to re-establish the PALTEX Operations Fund. This loan will be repaid upon the transference by PAHEF of all of PALTEX assets, including its financial resources. The remaining financial resources needed to cover the operation of the Program will be supported with the proceeds of sales.

(b) Estimated cost for the biennium 2012-2013 (estimated to the nearest US\$ 10,000, including staff and activities):

The estimated cost of a P4 post in Washington, D.C. is US\$ 367,200 for the biennium, and \$146,400 for a G-4 post.

(c) Of the estimated cost noted in (b), what can be subsumed under existing programmed activities?

The cost of the posts will be covered within the PALTEX budget. Over the past 5 years, the average annual sales have been \$7.9 million with an operating budget of \$3.5 million and cost of goods sold of \$3.8 million, approximately. This has resulted in an average annual surplus of \$600,000.

4. Administrative implications

(a) Indicate the levels of the Organization at which the work will be undertaken:

The Program is being undertaken at the regional and country levels.

(b) Additional staffing requirements (indicate additional required staff full-time equivalents, noting necessary skills profile):

A P4 (Advisor, PALTEX Program Management) for comprehensive management of the Program and a G4 (Administrative Assistant I) are needed, as well as temporary staff that may be needed for the transition.

(c) Time frames (indicate broad time frames for the implementation and evaluation):

The Program is fully operational. The full implementation of the Program under PAHO administration went into effect 1 April 2012. By the end of 2012 an evaluation will be undertaken on the overall performance of the Program, and a second one at the end 2013.



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Annex C

ANALYTICAL FORM TO LINK AGENDA ITEM WITH ORGANIZATIONAL MANDATES
1. Agenda item: 4.10: Expanded Textbook and Instructional Materials Program (PALTEX)
2. Responsible unit: Health Systems based on Primary Health Care/Human Resources for Health (HSS/HR)
3. Preparing officer: Regional Advisor of Nursing and Health Technicians at headquarters (assigned with technical coordination of PALTEX)
4. List of collaborating centers and national institutions linked to this Agenda item: The Program is implemented through a network of 530 institutions in 19 Member States, including universities, hospitals, NGOs, professional organizations, ministries of health and PAHO countries offices: some of them are PAHO/WHO Collaborating Centers.
5. Link between Agenda item and Health Agenda for the Americas 2008-2017: This Program contributes to the following strategic areas: <u>Strategic Area (f):</u> Strengthening the Management and Development of Health Workers <u>Strategic Area (g):</u> Harnessing Knowledge, Science, and Technology
6. Link between Agenda item and Strategic Plan 2008-2012: This agenda item is linked to: Strategic Objective 13: To ensure an available, competent, responsive and productive health workforce to improve health outcome, <i>RER 13.4:</i> Member States supported through technical cooperation to strengthen education systems and strategies at the national level, with a view to develop and maintain health workers' competencies, centered on Primary Health Care.
7. Best practices in this area and examples from countries within the Region of the Americas: Best practices in this area and examples from countries within the Region of the Americas: The Program has been operating for 46 years in 19 countries in the Region as a technical cooperation strategy to support and improve the quality of health sciences education in Latin America. It has promoted the production of textbooks and manuals by Latin American authors, and has also facilitated the use of the best available textbooks and learning resources, contributing to educate students, professors, managers, leaders and workers in the field of health, who have studied using textbooks and learning resources distributed by PALTEX.

8. Financial implications of this Agenda item:

This Program is financed through its own resources. The Program operates with a revolving fund. All its operating costs, including salaries, are covered with the proceeds of sales. A PALTEX Program Management Advisor is needed; this position will be included in the Program budget. Since the program has been transferred to PAHO effective 1 April 2012, an internal loan of US\$ 1 million has been allocated by the Director to re-start operations and to be able to re-establish the Working Capital Fund. This loan will be repaid upon the transfer of all PALTEX financial resources and assets from PAHEF. The remaining financial resources needed to cover the operation of the Program will be supported with the proceeds of sales.

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