Operational readiness for conducting global health research abroad

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ABSTRACT

Research excellence is the goal of all researchers. Conducting quality research with the ultimate aim of improving health is a shared goal among researchers in the global health domain. The competencies required for conducting and producing quality research in global health go far beyond the academic or scientific spheres. They incorporate aspects of research partnership, which places humility, empathy, and mutual respect at its core. Conducting quality respectful global health research requires an appropriate balance of operational readiness (i.e., technical, physical, and mental readiness). This paper reports on the pertinence and potential shaping of conceptual work and exploratory research focusing on aspects of mental readiness. These aspects may be perceived to be significant enough to influence success and warrant further investigation in the context of conducting global health research abroad.

KEY WORDS: Preparedness; excellence; research; graduate students; mental readiness; performance

La traduction du résumé se trouve à la fin de l'article.

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In promoting global health research, the Canadian Coalition for Global Health Research identifies the key elements of encouraging dialogue, building capacity, and promoting ethical and equitable actions and decisions.¹ Undergraduate and graduate curricula increasingly incorporate an overseas experience.² This has resulted in an increased focus on adequate preparation. The following is a discussion about the operational readiness for primarily graduate students who will be conducting research abroad.

Cross-disciplinary approach

Operational readiness studies in high-performance occupations have outlined effective practices that contribute to overall readiness in facing daily challenges. These occupations have spanned the gamut from neurosurgery to policing to high-altitude mountain guiding.³⁻⁵ Here, individuals perform and make decisions that influence life and death, and demand excellence. The commonality among them is the mental preparedness needed in meeting occupational standards of excellence which directly impact lives (and deaths). These studies have identified the critically important balance between readiness (technical, physical, and mental), performance, and resiliency. Furthermore, job-specific, mental readiness skills have been found to be a major contributor to peak performance. We suggest that this approach can be used effectively by anyone preparing to conduct research abroad. A tool (see Figure 1) has been developed to evaluate and create improvement strategies in terms of operational readiness.

Detailed specificity of conducting research abroad

Global health research shares front-line traits with high-performance occupations that include: an expectation for excellence, direct responsibilities, critical “peak” events, risk, and the need for skilled training. These traits complement intrinsic characteristics of being welcoming, open, mutually respectful, and equitable, which underpin the engagement of all persons involved

in the research. These foundational attributes translate into day-to-day issues that influence safety, productivity, and morale. Every occupation has detailed specificity regarding when readiness is critical and how best to prepare. Pooling related operational readiness lessons together with new data from the 22nd Canadian Conference on Global Health (CCGH)⁶ and the 2015 Global Health Students and Young Professionals (SYP) Summit,⁷ we can begin to build a profile for global health researchers.

GLOBAL HEALTH RESEARCHERS’ OPERATIONAL READINESS PROFILE

Challenging situations

Identifying perceived challenging situations can be helpful as a first step in understanding and preparing for conducting global health research abroad. “Next Generation Risk Science” research highlights the importance of assessing risks and challenging situations using innovative methodologies and addressing them using multiple interventions.⁸ This population-level approach can be personalized into readiness and performance elements. As a starting point, several experienced global health researchers, before and during CCGH, provided input to build three case studies to present both at CCGH

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Operational Readiness Assessment

Figure 1. Three stages of an Operational Readiness Assessment⁴

and at the SYP Summit. The challenges included: ethical decisions, cultural rules, authorities, deadlines, and adverse events. The following observations are based on feedback obtained from 259 participants in response to these case studies.

Overall readiness and performance

Overall readiness is based on an appropriate balance of physical ability, technical know-how, and mental skills. In global health research, as in some high-performance occupations, readiness contributes to success, both in the field experience and in the research results.

- *Physically* healthy (have required vaccines and relevant health information) and able to: eat and drink (local) foods and water, manage fatigue; perform necessary physical tasks.
- *Technically* knowledgeable on: specific research topic with measurable goals, culture, logistics, setting; effective at verbal and written communication; supported by local infrastructure (key personnel and resources – for example, in ensuring effective communication between researcher and research participant) and adequately funded; appropriate ethics approvals obtained.
- *Mentally* confident; having cultural humility; committed and empathetic; understanding personal motivations and the realities abroad; clear-headed and seeing the “big picture”; adaptable and flexible team player; able to: concentrate, refocus, and evaluate decisions; finding emotionally-supportive mentor(s).

When asked to grade the relative importance of physical, technical, and mental readiness in the overall success of conducting research abroad, technical and mental readiness were ranked similarly, with much lesser emphasis placed on physical readiness (Table 1).

Table 1. Reported relative importance of readiness factors, GHSYP Summit, 2015

Readiness factors	Mean (%)
Physical readiness	18
Technical readiness	42
Mental readiness	40
GHSYP = Global Health Students and Young Professionals.	

Important mental readiness skills

The following details important global health researcher skills identified from both the CCGH and the SYP Summit:

- *Confidence:* Recognize own biases and pre-judgements; use language that expresses confidence; be a good leader and team member; be a strong decision-maker, able to guide others and direct in difficult situations; have clear values while being open to and respecting those of others; show imagination, creativity.
- *Commitment:* Be respectful, kind, and courageous; show personal resiliency after a failure; do not give up; keep a high morale despite faults and random occurrences that might impact your research; take ownership for “failures”/ mistakes; create a balance between research and personal time; have curiosity.
- *Positive images/Visualization:* Visualize success to foresee solutions and prepare for possible setbacks.
- *Mental preparation:* Know your question, your goals and what you’re there for; foresee possible outcomes and how to handle them; be prepared to deal with the unexpected.
- *Focus:* Be mindful, patient, calm, and ready to adapt; be culturally sensitive; use active listening; stay open-minded and non-judgemental; focus on the task at hand and the motivation to keep going; have humility.
- *Distraction control:* Be ready for change and to adapt to the environment; be flexible in unforeseen issues, problems, and situations; choose battles wisely; keep perspective despite barriers, including cultural.
- *Constructive evaluation:* Seek and accept feedback; learn to adjust; be reflective; cope with unexpected setbacks.

NEXT STEPS

In order to further develop operational readiness for global health researchers to incorporate into ongoing preparations, additional research would be beneficial. By building on previous research and tools from other disciplines, key next steps have been identified which those involved in global health research might find useful:

- Adapt current “core competencies” to include a balance in physical, technical, and mental readiness skills.
- Develop a “Case Study Inventory” for training opportunities to discuss realistic ethical and other challenges in the field.

- Create a “Self-Assessment Tool” to evaluate physical, technical, and mental readiness.
- Use challenges and specific scenarios to address the perceptions, gaps, and needs of junior researchers.
- Establish a “Code of Conduct” to highlight invaluable front-line lessons learned related to operational readiness in conducting research abroad.
- Conduct a Comprehensive Research Study to capture the operational readiness of highly-respected global health researchers.

Building on our research to date, additional work along the lines suggested above would serve to greatly enhance our capacity for operational readiness in a global health research context.

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RÉSUMÉ

L’objectif de tous les chercheurs est de faire preuve d’excellence en recherche. La réalisation de travaux de recherche de haute qualité dans le but ultime d’améliorer la santé est un objectif commun chez les chercheurs impliqués dans le domaine de la santé mondiale. Les compétences requises pour mener et produire des travaux de recherche de haute qualité en santé mondiale vont bien au-delà des sphères académiques ou scientifiques. Elles incorporent des aspects du partenariat de recherche, lequel se fonde sur l’humilité, l’empathie et le respect mutuel. Afin de mener des travaux de recherche respectueux et de haute qualité en santé mondiale, un équilibre approprié en matière de préparation opérationnelle (c.-à-d. sur le plan de la préparation technique, physique et mentale) doit être atteint. Cet article fait état de la pertinence et de la mise en forme potentielle de travaux conceptuels et de projets de recherche exploratoires axés sur les particularités de la préparation mentale. Ces particularités peuvent être perçues comme étant suffisamment importantes pour conditionner la réussite et méritent des recherches plus approfondies dans le contexte de la réalisation de travaux de recherche en santé mondiale à l’étranger.

MOTS CLÉS : préparation; excellence; recherche; étudiants des cycles supérieurs; préparation mentale; rendement