

# Management of Tuberculosis Training for Health Facility Staff

## How to Organize Training for Health Facility Staff on TB Control



WORLD HEALTH ORGANIZATION  
Geneva



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Management of Tuberculosis  
Training for Health Facility Staff

**HOW TO ORGANIZE TRAINING FOR  
HEALTH FACILITY STAFF ON  
TB CONTROL**



World Health Organization  
Geneva  
2004



K N C V



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## *Acknowledgements*

This guide and the related set of training modules for health facility staff were prepared by the Stop TB Department, World Health Organization, Geneva, through a contract with ACT International, Atlanta, Georgia, USA. The project was coordinated by Karin Bergstrom; Fabio Luelmo was the main technical adviser.

The American Lung Association (ALA), the American Thoracic Society (ATS), the Centers for Disease Control and Prevention (CDC), Atlanta, and the Royal Netherlands Tuberculosis Association (KNCV) have all contributed to the development of the modules through the Task Force Training (TFT) of the Tuberculosis Coalition for Technical Assistance (TBCTA).

The modules were field-tested in Malawi through the support of the National Tuberculosis Control Programme of Malawi.

Editor: Karen Ciceri

This publication was partially funded by the Office of Health, Infectious Diseases and Nutrition, Bureau for Global Health, United States Agency for International Development, through the Tuberculosis Coalition for Technical Assistance, a cooperative agreement to accelerate the implementation and expansion of the DOTS strategy in developing countries.

*How to Organize Training for Health Facility Staff on TB Control* is one booklet in a set of materials for the course *Management of Tuberculosis: Training for Health Facility Staff*. The user of this guide should be familiar with the course materials and teaching methods.

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# How to Organize Training for Health Facility Staff on TB Control

## 1. Introduction

### 1.1 Target population for this guide

This guide, *How to Organize Training for Health Facility Staff on TB Control*, is for **provincial or district level staff responsible for training** health facility staff who detect and treat cases of tuberculosis (TB). This guide explains options for using the course *Management of Tuberculosis: Training for Health Facility Staff*. The national TB control programme will determine how the course is to be used in a particular country and will make any necessary adaptations in the course materials. This guide is for the staff who will implement training at the provincial or district level, according to directives from the national level.

When the national TB control programme decides to use the course materials as recommended, for complete training courses, **course directors** will be assigned to organize and direct specific courses. Course directors will typically need to use sections 3–7 of this guide, which describe preparing for a full course, training or briefing facilitators, and directing a full course. If alternative training options are chosen, refer to section 8.

### 1.2 Purpose and target population of the training course

The course *Management of Tuberculosis: Training for Health Facility Staff* has been designed for health workers who are responsible for detecting and managing patients with TB. These health workers may include health assistants, medical assistants, nurses, clinical assistants, clinicians, or physicians. Some may be private practitioners. Health workers may be male or female.

Health workers may work at health centres, hospital outpatient departments, dispensaries, or health posts. Throughout this course, the term “health facility” is used to include all types of health services that deliver outpatient care.

In most health facilities, TB control is part of general health care delivery. TB patients are received along with other types of patients. Improving TB management is part of improving health care in general.

This course teaches the skills and knowledge that health workers specifically need to detect cases of pulmonary TB, manage drug therapy for TB patients, inform patients about TB, and monitor the success of TB case detection and treatment at health facility level. The course does not teach basic medical techniques familiar to health workers, such as how to give injections or sterilize needles and syringes.

The course does not teach medical procedures used by clinicians to diagnose TB, manage severe side-effects, treat TB patients who have defaulted, or treat patients with chronic or multidrug-resistant TB (MDR-TB). For information on these procedures, physicians and

other clinicians should refer to World Health Organization (WHO) treatment guidelines and appropriate references.<sup>1</sup>

It is expected that participants in this course will implement the procedures taught. In order to implement these procedures, health facilities will need:

- supplies for collecting sputum samples (containers, labels),
- access to microscopy for examining sputum samples for TB,
- adequate supplies of anti-TB drugs, and
- standard TB forms and registers.

TB treatment regimens vary from country to country. Health facilities should, of course, use the specific treatment regimens recommended in their national guidelines. The general principles and practices taught in the course are applicable anywhere.

### **1.3 Course methods and materials**

This course uses a variety of methods and instruction, including reading, written exercises, discussions, role plays, demonstrations, and observations in a real health facility. Practice, whether in written exercises or role plays, is considered a critical element of instruction.

The complete training course includes the following modules (booklets containing units of instruction):

**A: Introduction**

**B: Detect Cases of TB**

**C: Treat TB Patients**

**D: Inform Patients about TB**

**E: Identify and Supervise Community TB Treatment Supporters**

**F: Manage Drugs and Supplies for TB**

**G: Ensure Continuation of TB Treatment**

**H: Monitor TB Case Detection and Treatment**

The course also includes a module describing a field exercise to observe TB management at a health facility and a reference booklet containing important forms, worksheets, and summaries of procedures taught in the course:

**I: Field Exercise – Observe TB Management**

**J: Management of Tuberculosis – Reference Booklet**

When the complete course is used as designed, small groups of participants are led and assisted by “facilitators” as they work through the course modules. The facilitators are not lecturers as in a traditional classroom. Their role is to answer questions, provide individual feedback on exercises, lead discussions, structure role plays, etc. For the most part,

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<sup>1</sup> Examples of references include:

Frieden T. *Toman's tuberculosis. Case detection, treatment, and monitoring: questions and answers*, 2nd ed. Geneva, World Health Organization, 2003.

Crofton J, Horne N, Miller F. *Clinical tuberculosis*. London, Macmillan, 1999.

participants work at their own pace through the modules, although in some activities, such as role plays and discussions, the small group works together.

## **1.4 Learning objectives**

Each module provides information, examples, and practice of certain skills necessary for detecting and managing TB cases and monitoring progress. Exercises are provided at the end of each module. The skills and information presented in each module are as follows:

### **A: Introduction**

- What is tuberculosis
- Importance of TB as a public health problem
- The DOTS strategy for control of TB
- Description of the training course
- Glossary (definitions of terms that may be unfamiliar)

### **B: Detect Cases of TB**

- Procedures for detecting TB suspects
- How to use a *Register of TB Suspects*
- How to collect sputum samples
- How to use laboratory sputum results to identify TB cases
- Steps to inform TB suspects of results and begin additional care as needed
- How to check household contacts of TB cases

### **C: Treat TB Patients**

- How to choose the appropriate treatment category
- How to determine where a patient will receive directly observed treatment
- How to prepare a patient's *TB Treatment Card*, including specifying the treatment regimen and dose
- How and when to provide preventive therapy for household contacts of the TB patient
- How to give directly observed treatment and record it on the *TB Treatment Card*
- How to recognize side-effects and what to do
- How to determine when a patient is due for follow-up sputum examination
- How to decide, based on sputum results, the appropriate action needed
- How to determine treatment outcome

### **D: Inform Patients about TB**

- Communications skills useful for informing patients
- How to inform the TB patient and family about TB and directly observed treatment (first meeting)
- Messages for the TB patient and family about TB and directly observed treatment
- How to continue informing the patient throughout treatment (subsequent meetings)
- Continuing messages for the TB patient about the treatment regimen (including the drugs, treatment schedule, side-effects, sputum examinations)
- Messages about human immunodeficiency virus (HIV) and TB, and pregnancy and HIV testing

### **E: Identify and Supervise Community TB Treatment Supporters**

- How to help the patient identify a community TB treatment supporter who is likely to be effective
- How to train and supply a community TB treatment supporter with drugs
- How to resupply the community TB treatment supporter with drugs and review the patient's *TB Treatment Card* on a monthly basis
- Steps to take if the community TB treatment supporter does not collect the next month's drugs

### **F: Manage Drugs and Supplies for TB**

- How to ensure sufficient stock of drugs for TB patients
- How to plan for other needed supplies (such as sputum containers, syringes and needles, forms)
- Good drug management procedures for safekeeping the supply of anti-TB drugs

### **G: Ensure Continuation of TB Treatment**

- How to coordinate medical referrals and ensure that the TB patient continues treatment
- How to coordinate transfer of a TB patient who is moving to another area
- How to arrange for TB patients to continue treatment when travelling
- How to conduct a home visit to a patient who misses a dose or fails to collect drugs for self-administration
- How to trace a patient who interrupts treatment
- How to plan so that health facility staff are able to conduct home visits and trace patients

### **H: Monitor TB Case Detection and Treatment**

- Key indicators related to TB case detection and data needed to monitor these
- How to compile data on TB case detection at the health facility
- Key indicators related to TB treatment and data needed to monitor these
- How to compile data on TB treatment at the health facility
- How to calculate indicators
- How to analyse indicators
- How to plan appropriate actions to solve problems

## 2. Options for using the course materials

There are a number of options for using the course materials.

- **Full course**

This is the recommended option, especially during DOTS expansion. The TB nurse, TB officer, or other person responsible for TB in each health facility should complete the full course, as adapted by the national TB control programme. The full course may be conducted:

- without interruption as a 5-day training course, or
- as a series of shorter training sessions given over a period of weeks or months (for example, one module per week).

- **Partial course**

Selected modules may be used in a training session to teach specific needed skills or address specific problems in an area. The modules to be taught would be determined at the national level.

- **On-the-job training**

Modules may be used on the job for reinforcement or retraining when a problem is identified. Modules may also be used to orient new staff until they can attend a full course.

- **Self-teaching**

Motivated health workers may work through modules on their own for reinforcement or retraining. New staff may work through modules on their own until they can attend a full course.

- **Reference**

Modules may be used a reference for staff in general health facilities.

Some of the advantages and disadvantages of the different training options are listed on the next page.

The national TB control programme will determine which options are most appropriate in a given area of the country at a given time. Provincial or district staff who are responsible for training health facility staff will usually be asked to implement a particular option.

*If you are asked to organize or conduct a full course, use sections 3–7 of this guide.*

*If you are asked to implement an alternative training option, refer to section 8.*

### ***Advantages and disadvantages of training options***

<b>Option</b>	<b>Advantages</b>	<b>Disadvantages</b>
Full course without interruption (5 days)	Participants are motivated to attend a special course. While away from work, they can devote full attention to the course. Participants remember the content from one module to the next. The course director has control over how the course is taught. Over a period of days, facilitators get to know participants' needs and abilities and are available to help.	Participants must take a block of time away from work.  If many staff from a facility are trained at a course at the same time, the facility may be unable to provide services during that period.
Full course given as a series of shorter training sessions	It may be easier for participants to miss work 1 day per week or month rather than 5 consecutive days. Participants have a chance to apply skills learned in one module on the job before moving to the next module.	Logistics are more complicated to arrange.  Participants may forget content between training sessions. Review may be necessary before starting next module.  Participants may not attend all sessions. (They may forget or have a conflict.)
Partial course (selected modules)	Modules are selected that are most relevant to problems identified. A shorter course requires less time and expense.	Participants may not understand how all of the tasks in management of TB fit together. Some skills may be harder to learn without doing the previous modules.
On-the-job training	Convenient for participants and facilities. Not necessary to travel away from the workplace. Demonstration of skills in the work setting adds realism and relevance to learning. A skilled instructor or supervisor can assess what an individual has learned and provide exactly the guidance or information needed.	Less control over how the modules are taught. Participants may not be motivated or able to fit working on the modules into their regular work schedule. Group discussions and role plays are likely to be omitted. Requires skilled supervisor or mobile instructor to fit the modules into the work schedule, adapt some exercises to the real work setting and live cases, etc.
Self-teaching	It is easy and relatively inexpensive to give out the course materials. This method is not limited by the number of facilitators available, so more health workers can be reached simultaneously. Motivated, capable health workers may learn well independently if supported by a supervisor who can answer questions and ensure completion of modules.	No control over whether the modules are actually read or used. Learners must have sustained ability to read, write, and concentrate and motivation to complete the materials. Different learners' abilities to understand vary greatly. Group discussions and role play exercises cannot be done. Learners receive little or no help in acquiring the skills. There may be no one available to answer questions. No way to know whether individuals learn the skills or can apply them.

### 3. Preparing for a full course

Careful planning and strong administrative support are essential before, during, and after the *Management of Tuberculosis* training course. This section of *How to Organize Training for Health Facility Staff on TB Control* describes the necessary plans and arrangements for a full course, whether it will be conducted without interruption or as a series of shorter sessions. This section is addressed to the course director. A suggested schedule for the course is provided at the end of this section on pages 18–19.

#### 3.1 Checklist for planning and administrative arrangements

As the course director, you may not be directly responsible for all of the items on this checklist, but you can ensure that appropriate arrangements are being made, or you can assign someone responsibility for making them. Arrangements may not be listed in the exact order in which they will be made. Feel free to write in any additional reminders.

##### ***Initial planning of a full course***

1. \_\_\_\_\_ General location of course selected. The location must have adequate classroom facilities, and lodging if participants do not live in the area. (See item 8 on this checklist.) If the course will include a field exercise (a health facility visit) and/or a visit to a laboratory that does sputum examinations, these facilities must be accessible in the area. (See pages 16–17 for a description of the optional field exercise and laboratory visit.)
2. \_\_\_\_\_ Time frame identified for giving the course. The entire course may be given at one 5-day training session, or modules may be taught separately at convenient time intervals, for example one module per month. (Note: If modules are used separately rather than giving the entire course in one training session, some of the following steps may not apply.)
3. \_\_\_\_\_ Copies of course materials obtained.
4. \_\_\_\_\_ Availability of facilitators assessed. Are trained facilitators available, or will you need to train or brief new facilitators for this course? (See section 4, page 21, to determine whether a 3½-day full facilitator training or a 2-day briefing is needed.)
5. \_\_\_\_\_ Specific dates selected for course and facilitator training or briefing (if needed). The schedule provided on page 19 indicates the time required for each module as well as for the entire course.
  - a. \_\_\_\_\_ 5 calendar days allowed for the course.
  - b. \_\_\_\_\_ 3½ days (plus at least 1 day off) allowed for full facilitator training, or 2 days allowed for briefing.
  - c. \_\_\_\_\_ Course director available 1–2 days before facilitator training/briefing (if applicable) or before course, and during all of facilitator training/briefing and course.

6. \_\_\_\_\_ Letters sent to the appropriate district/regional/local office asking that office to identify health workers for training. Letter:
- a. \_\_\_\_\_ announces the course, *Management of Tuberculosis: Training for Health Facility Staff*, and explains the purpose of the course.
  - b. \_\_\_\_\_ clearly states the number of participants to attend the course, and that these should be health workers responsible for detecting TB cases and treating TB patients at the health facility level.
  - c. \_\_\_\_\_ states the time requirements for attending the course.
  - d. \_\_\_\_\_ states that participants who complete the entire course will receive a certificate.
  - e. \_\_\_\_\_ describes the location and dates of the course.
  - f. \_\_\_\_\_ states the date by which course participants should be nominated and the person to whom names should be sent.
  - g. \_\_\_\_\_ clearly states required language and reading skills, and stresses that the course is challenging and requires hard work.
7. \_\_\_\_\_ Facilitators selected and invited. (See 3.2 Criteria for selecting facilitators, page 13.) Ensure that:
- a. \_\_\_\_\_ there will be at least one facilitator for every 3–6 participants expected to attend the course.
  - b. \_\_\_\_\_ facilitators will attend all of facilitator training/briefing (if needed) and the course. Even if facilitator training/briefing is not needed, facilitators should arrive in time to meet one another and arrange classrooms before the course.
8. \_\_\_\_\_ Precise locations selected and reserved for classrooms and lodging. (To minimize transportation needs, classrooms should be within easy walking distance of the lodging and easy travelling distance of any health facilities or laboratory to be visited.) Selection based on availability of:
- a. \_\_\_\_\_ adequate lodging (if needed) for all facilitators and participants
  - b. \_\_\_\_\_ accessibility to health facility or laboratory, if these will be visited
  - c. \_\_\_\_\_ convenient meal service
  - d. \_\_\_\_\_ large room for seating all participants, facilitators, and visitors to the course (*needed only for the course, not for facilitator training*)
  - e. \_\_\_\_\_ smaller rooms for groups of 6–14 people to work in, plus separate space for individual consultations (*During facilitator training, only one*

*of these rooms will be needed. During the course, one room is needed for each small group of participants.)*

- f. \_\_\_\_ tables, chairs, adequate lighting, and blackboard or flipchart for each of these rooms
  - g. \_\_\_\_ separate room for secretariat.
9. \_\_\_\_ List compiled of health workers to be invited to participate in the course.
10. \_\_\_\_ Letters of invitation sent out to selected participants. Letters:
- a. \_\_\_\_ briefly describe the purpose and organization of the course.
  - b. \_\_\_\_ state desired arrival and departure times for participants.
  - c. \_\_\_\_ describe arrangements for travel and payment of per diem.
11. \_\_\_\_ Arrangements made for a secretary/administrative assistant to be available to deal with administrative tasks 2–3 days before the course (or facilitator training) begins. See next parts of this checklist for administrative tasks. Throughout the course, the secretary will need to ensure that things go smoothly and that the work of facilitators and participants is not unduly interrupted. This person may also need to work an extra day after the course to pack up remaining materials and pay bills.
12. \_\_\_\_ Travel authorizations, if needed, sent to facilitators and participants.
13. \_\_\_\_ Course completion certificate designed and adequate copies printed (to be signed and awarded to all participants and facilitators at the end of the course).
14. \_\_\_\_ Arrangements made for providing adequate numbers of copies of the course materials and necessary supplies for classroom activities. (Necessary materials and supplies are listed on pages 14–15 of this guide. See page F-2 of the *Facilitator Guide* to decide on supplies needed for the drug exercise.)
15. \_\_\_\_ Arrangements made for sending/transporting necessary materials and supplies to the course location.

***At the course location, before facilitator training/briefing begins (if applicable):***

16. \_\_\_\_ Adequate lodging arrangements confirmed for all facilitators.
17. \_\_\_\_ Arrangements made for receiving and orienting facilitators on arrival.
18. \_\_\_\_ Arrangements confirmed for rooms for conducting facilitator training/briefing:
- a. \_\_\_\_ one room for conducting facilitator training/briefing (with characteristics listed in 24b below).

- b. \_\_\_\_ one room for a secretary with space for storing modules, forms, and other supplies, available during both facilitator training and the course.
  - c. \_\_\_\_ one overhead projector.
19. \_\_\_\_ Schedule for facilitator training/briefing made based on suggested schedule in this guide. (See 5.2 Preparing a schedule for full facilitator training, pages 26–28; 6.2 Preparing a schedule for the briefing, pages 64–66.)
  20. \_\_\_\_ Sufficient copies made of registration forms, schedule for facilitator training, etc. for use during facilitator training.
  21. \_\_\_\_ On arrival, facilitators registered and given schedule and course materials for facilitator training/briefing.

Section 5 of this guide describes how to conduct a full facilitator training session. Section 6 describes how to conduct a briefing.

***At the course location, before the course begins***

22. \_\_\_\_ Adequate lodging arrangements confirmed for all facilitators and participants.
23. \_\_\_\_ Arrangements made for receiving and orienting facilitators and participants at the course location.
24. \_\_\_\_ Arrangements confirmed for adequate rooms for conducting the course:
  - a. \_\_\_\_ large room available on the first and last day of the course for seating all facilitators, participants, and visitors.
  - b. \_\_\_\_ smaller room available during the course for each small group of participants, each room having:
    - \_\_\_\_ sufficient table/desk area and chairs for 6–12 participants and 2 facilitators, plus separate consultation area with additional chairs
    - \_\_\_\_ additional table area for supplies
    - \_\_\_\_ blackboard or flipchart stand with paper
    - \_\_\_\_ adequate lighting and ventilation
    - \_\_\_\_ freedom from distractions such as traffic or construction noises or loud music.
  - c. \_\_\_\_ one room for a secretary and the course supplies.
  - d. \_\_\_\_ overhead projectors (ideally, one per group, but if this is not possible, equipment may be shared.)

25. \_\_\_\_ Arrangements made for registering participants for the course.
  - a. \_\_\_\_ Sample Course Registration Form (page 88 of this guide) reviewed and items added if needed.
  - b. \_\_\_\_ Copies made of Course Registration Form.
26. \_\_\_\_ Arrangements made for typing and copying of materials during the course (for example, registration forms, schedules, list of participants, end-of-course evaluation questionnaires).
27. \_\_\_\_ Arrangements made for meals and coffee/tea service.
28. \_\_\_\_ Arrangements made for reconfirming or changing airline, train, bus, car reservations for participants.
29. \_\_\_\_ Arrangements made for paying per diem to participants and facilitators.
30. \_\_\_\_ If field exercise will be conducted, health facility and/or laboratory confirmed to be suitable for visiting. Health facility and/or laboratory staff informed about visit. (See pages 16–17 of this guide.)
31. \_\_\_\_ Arrangements made for daily transportation, if needed, to and from classrooms.
32. \_\_\_\_ Plans for opening ceremony of course finalized with local authorities.
33. \_\_\_\_ Course schedule developed and reproduced in sufficient quantity to give a copy to each facilitator and participant. (See 3.6 Suggested schedule for a full course, page 18.)
34. \_\_\_\_ Pairs of facilitators assigned to work together during the course. (Note: Facilitators may have different strengths and weaknesses. A facilitator who is weak in one area should be paired with someone who is strong in that area.) Where possible, consider the following when making assignments:
  - fluency in language in which the course is given and language spoken in health facilities,
  - strengths (for example, experience with TB management procedures, understanding of course content, capability as a classroom trainer),
  - motivation to be a facilitator,
  - personality and temperament (for example, shy paired with outgoing).
35. \_\_\_\_ Course materials and supplies organized and placed in the appropriate classrooms. (See lists on pages 14–15 of this guide.)

### ***During the course***

36. \_\_\_\_ Course participants registered using Course Registration Form.
37. \_\_\_\_ Groups of 6–12 participants assigned to pairs of facilitators. Group assignments posted following opening ceremony. (Note: Since role play exercises are often done in groups of 3 participants, it is preferable to have multiples of 3 in each training group.)
38. \_\_\_\_ Copies of completed registration forms for participants in each group distributed to the facilitators for that group.
39. \_\_\_\_ Secretariat monitors or carries out administrative activities.
40. \_\_\_\_ Course directory (including names and addresses of all participants, facilitators, and the course director) provided to everyone.
41. \_\_\_\_ Course photograph, if desired, made in time to be developed before closing ceremony.
42. \_\_\_\_ Sample Evaluation Questionnaire (pages 92–94 of this guide) modified as needed and copied for each facilitator and participant.
43. \_\_\_\_ Arrangements made for closing session.
44. \_\_\_\_ Course completion certificate signed for presentation to each participant.

## 3.2 Criteria for selecting facilitators

A group of motivated facilitators is needed to conduct this course. The facilitators will work in pairs with small groups of participants to guide them through work on the modules and the field exercise. Two facilitators are needed for each small group of 6–12 participants. Even in a very small course, at least two facilitators are needed; if necessary, the course director may serve as one of the facilitators. The facilitators' tasks are described in detail in the *Facilitator Guide*.

Facilitators must be trained or briefed before serving for the first time as facilitators in this course. Section 4 of this guide describes how to choose an appropriate agenda for training facilitators, and sections 5 and 6 describe how to train or brief facilitators. The criteria below indicate the **type of person** that should be selected for training or briefing as a facilitator.

- Facilitator candidates should be **currently competent in TB case detection and treatment**. They must have the **basic clinical skills and technical knowledge** that will allow them to explain the TB case management guidelines taught in this course.
- They must have **good communication skills**, including the ability to explain things clearly and simply to others. Facilitators in this course are not expected to give lectures but to guide participants through written materials, role play exercises, discussions, etc. Facilitators must be observant individuals who can see when participants are having difficulty, can explain things clearly, and can give helpful feedback. Experience in facilitating other modular courses (such as *Integrated Management of Childhood Illness*, 1997, or *Managing Tuberculosis at District Level*, 1996) is helpful but not required.
- They must be **familiar with the course materials**. Facilitator candidates should first attend a course as a participant.<sup>1</sup>
- If participants speak a different **language** than the written language of the course, at least one facilitator per group should know the spoken language of the participants.
- Facilitators must be **organized**. They must be able to keep the group on schedule and plan ahead for the next task.
- Facilitators must be **available throughout the course**. They must have the **energy and motivation** to work a long day with participants and then attend a facilitator meeting to review the day's work and prepare for the next day.

Note: In any course, facilitators may identify participants who would eventually make good facilitators themselves. Ask facilitators to point out participants who:

- easily understand the modules and the guidelines for TB case management
- communicate clearly
- help others and work well with others in their group
- participate confidently in discussions and role plays.

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<sup>1</sup> However, when the course is first introduced in an area, it may be necessary to allow facilitators to become familiar with the course materials by working through them independently or as part of a full facilitator training session.

### 3.3 List of instructional materials needed

**Each small group** will need the following instructional materials to work on modules in the classroom setting.

Item needed	Number needed
<i>Facilitator Guide</i>	1 for each facilitator
Set of nine modules (A–I), plus J: <i>Reference Booklet</i>	1 set for each facilitator and 1 set for each participant
Answer sheets	1 packet for each participant
(If overhead projector is available) Set of overhead transparencies of <i>TB Treatment Card, Summary Worksheet</i> , and other forms and worksheets as desired, for example, <i>Register of TB Suspects, Request for Sputum Examination</i> , and guides for informing patients from module D. Alternative to overhead transparencies: Enlarged photocopies of forms	1 set for each facilitator
Schedule for the course (based on the schedule provided on page 19 of this guide but including specific dates and times)	1 for each facilitator and participant

### 3.4 List of other supplies needed

#### *Supplies needed for each person*

- name tag and holder
- 2 pens
- 2 pencils with erasers
- paper
- highlighter
- folder or large envelope to collect answer sheets
- calculator (optional but helpful)

#### *Supplies needed for each small group*

- large paper clips
- pencil sharpener
- stapler and staples
- 1 roll masking tape
- extra pencils and erasers
- flipchart pad and markers, or blackboard and chalk
- overhead projector (if possible), and erasable markers for writing on overhead transparencies

In addition, certain exercises require special supplies. Supplies for role plays and group activities for **each small group** include the following:

- At least 3 (preferably 9) sputum containers for every three participants. (3 containers are adequate if labels can be erased.)
- Depending on how participants are provided with anti-TB drugs at their health facilities:
  - preassembled drug boxes for different drug regimens and weight ranges, or
  - quantities of different drugs to assemble in boxes. (These should be drug formulations and packaging similar to those used in participants' health facilities.)

If preassembled boxes are used, obtain at least one and preferably two preassembled boxes per group.

If preassembled boxes are not used and facilitators must assemble the boxes themselves, obtain enough drugs to make one box for every two participants, or at least two boxes per group. (See page F-2 of the *Facilitator Guide*.)

### 3.5 Preparing for the field exercise

This course includes an optional field exercise in which course participants may visit a health facility that provides TB services. I: *Field Exercise* describes how to conduct this visit and provides a variety of checklists for observing different aspects of TB case detection and treatment. As the course director, you are responsible for deciding:

- whether a field exercise will be conducted during the course,
- if so, what health facility(ies) will be visited, and
- which checklists from module I: *Field Exercise* will be used to guide participants' observations.

Only conduct the field exercise if it can be done well and at a suitable facility. Read module I: *Field Exercise* to determine which checklists will be most useful during the visit. Three checklists are recommended to observe identification of TB suspects and use of the *Register of TB Suspects* and *TB Treatment Cards*. Six optional checklists are provided to be used as desired and feasible.

#### **Criteria for selecting health facility(ies) for field exercise**

- TB-related activities at the health facility should be as consistent as possible with those taught in the training course.
- The health facility should have a sufficient TB case-load and acceptable quality of care.
- The director and staff of the facility should be interested in the course and willing and able to cooperate.
- It is best if the health facility is close to the classrooms to minimize travel time.

You will need to visit the health facility in advance to view the facility and determine how many participants can comfortably observe at a time. If there are a large number of participants, more than one health facility may be selected to accommodate them.

During the preparatory visit, inform the **health facility staff** about the participants who will be visiting and ask for their cooperation. Explain that participants would like to learn by watching and asking questions. Explain that they will have checklists to guide their observations and questions. Participants will need access to the health worker responsible for treating TB patients, but they should not interfere with patient care. Depending on the checklists that you have selected, mention the activities or forms that participants will observe and/or ask about, for example:

- identification of TB suspects,
- the *Register of TB Suspects* (request that participants be allowed to review),
- *TB Treatment Cards* (request that some cards be ready for participants to read),
- sputum collection (if a TB suspect or suitable TB patient is available),
- TB treatment (if a TB patient is present),
- informing patients about TB (if a TB patient is present),
- supervision and resupply of community TB treatment supporters,
- management of drugs and other supplies for TB.

Explain that participants will not all observe the same aspect of TB management at the same time. Instead, they will work individually or in pairs on different aspects. When they have finished one aspect, they will take a turn at another.

Request that participants be allowed to observe management of TB patients if any are present. Ask about the best times to schedule visits so that TB patients are likely to be present.

Try to schedule the field exercise towards the end of the course, but allow time for discussion following the visit. The visit will be most effective if the participants have already learned about case detection, treatment, informing patients, drug supplies, and community TB treatment supporters.

Schedule each small group to visit the health facility at a different time, to avoid having too many visitors at once. If the facility is very small and the group is large (e.g. nine or more participants), divide into two groups to visit on different days, or select an additional facility to visit. Make arrangements for transportation of each small group.

The schedule should allow about 1–2 hours at the health facility. In addition, allow time for transport to and from the health facility.

### ***Optional laboratory visit***

A laboratory visit may be included in the field exercise if it will be useful and feasible. Module I: *Field Exercise* includes a checklist for observing activities in a laboratory that does sputum examinations.

Determine whether there is a laboratory that does sputum smear examinations in the health facility to be visited (or near to the health facility or the classroom). If so, ask whether participants could visit (one small group at a time) and whether a staff member could explain the path followed by sputum samples. Make plans for participants to see how samples are received and processed and to examine the laboratory registration book to see how samples are tracked through the laboratory. If possible, ask that a microscope be prepared so that participants can look through the microscope to see a sputum smear that is positive for TB bacilli. If the laboratory visit will be possible, add sufficient time to the schedule for each group.

### **3.6 Suggested schedule for a full course**

A possible schedule is given on the next page. When adapting this schedule, keep the following points in mind:

- Since groups will work at different paces, the schedule should be flexible. It should not list precise times for completion of modules but should indicate general time frames instead. You will, however, need to list specific times for beginning and ending the day, tea breaks, and lunch.
- Five days of work are required for the participants to complete the modules.
- The schedule includes 7 working hours every day. It is assumed that 1–1½ additional hours will be used for lunch and tea breaks each day.
- It is helpful to schedule a time apart from regular course hours when at least one facilitator is available to discuss any problems or questions.
- Homework on exercises is not recommended for participants. The course work is tiring, so participants should not be asked to do additional work in the evenings.

***Suggested schedule for a full course***

	<b>Activity</b>	<b>Time</b>
<b>Day 1</b>	Registration	0.5 hour
	Opening presentation	1 hour
	Module A: <i>Introduction</i>	1 hour
	Module B: <i>Detect Cases of TB</i>	4.5 hours
<b>Day 2</b>	Module C: <i>Treat TB Patients</i>	7 hours
<b>Day 3</b>	Module D: <i>Inform Patients about TB</i>	3.5 hours
	Module E: <i>Identify and Supervise Community TB Treatment Supporters</i>	3.5 hours
<b>Day 4</b>	Module F: <i>Manage Drugs and Supplies for TB</i>	2 hours
	Module G: <i>Ensure Continuation of TB Treatment</i>	2 hours
	Module I: <i>Field Exercise – Observe TB Management</i>	3 hours
<b>Day 5</b>	Discussion of Field Exercise	1 hour
	Module H: <i>Monitor TB Case Detection and Treatment</i>	4 hours
	Closing session	1 hour



## 4. Choosing the appropriate agenda for training facilitators

Well-trained and supportive facilitators are necessary for the success of this course. Even if facilitator candidates have recently been participants in the course *Management of Tuberculosis*, or are experienced in managing tuberculosis, it is still important for them to be briefed or trained as facilitators.

The extent of training needed depends on the background of the facilitator candidates. If they have previously taught another module-based course, such as *Integrated Management of Childhood Illness* (IMCI), they may already be familiar with most of the facilitator techniques used in the course *Management of Tuberculosis*. They may need to focus primarily on selected teaching activities that are different for this course.

However, if the facilitator candidates have never been facilitators before, their training must demonstrate and provide practice in all of the facilitator techniques used in the course, including how to give individual feedback, lead a group discussion, coordinate role plays, etc.

This guide presents two different agendas for use in facilitator training:

- a full facilitator training agenda (3½ days), described in section 5
- a briefing agenda (2 days), described in section 6.

Six to ten facilitators may be trained during a session. Use the following table to decide which agenda is appropriate:

If trainees:	And:	Then:	Emphasis:
Have been facilitators in a module-based course, such as IMCI	Have taken the course as participants	Use the <b>briefing agenda</b> (section 6)	Review of course content Selected facilitator techniques that may be unfamiliar
	Have <b>NOT</b> taken the course as participants	Use the <b>full facilitator training agenda</b> (section 5)	Course content Practice of all facilitator techniques used in the course
Have <b>NOT</b> been facilitators in a module-based course before	→		

If a group includes some trainees who have experience in facilitation and some who do not, use the full facilitator training agenda. The experienced facilitators can demonstrate facilitator techniques to the others.

Once a facilitator has been trained to teach this course, it is not necessary for that person to attend facilitator training again. However, time must be allowed before each course for co-facilitators to meet one another and plan how to work together.



## 5. Guidelines for conducting full facilitator training (3½ days)

### 5.1 Overview of the training session

#### ***Who should attend the full facilitator training?***

Facilitator candidates should attend the full facilitator training if they:

- have not been a facilitator in a module-based course (such as IMCI) before, **or**
- have not attended the course *Management of Tuberculosis: Training for Health Facility Staff* as participants.

Others will benefit from the full training as a thorough review of the course content and facilitator techniques.

#### ***Who conducts facilitator training?***

Course directors are responsible for conducting facilitator training. If possible, a co-director or an experienced facilitator should assist the course director. Since training is intensive, two people should work together. By working together, two course directors can also demonstrate how co-facilitators share the work during the actual course.

#### ***What is accomplished during facilitator training?***

During the facilitator training session, the facilitator trainees will work quickly through the modules and will take turns practising the teaching activities described in the *Facilitator Guide*. In addition to reviewing the content of the modules, there will be extensive discussion and practice of facilitator techniques including:

- working with a co-facilitator
- introducing a module
- giving individual feedback
- conducting a demonstration
- leading a discussion
- coordinating a role play

By the end of facilitator training, trainees will be well prepared to work with a co-facilitator to lead a small group of 6–12 participants through the course.

#### ***When and where should facilitator training occur?***

The full facilitator training session requires 3½ days. (A suggested schedule is provided on pages 26–28.) The training session should occur before the course. There should be at least one full day off between facilitator training and the course to allow facilitators to rest.

It is helpful to train facilitators in one of the classrooms that will be used by a small group in the actual course. In that way, the group can become accustomed to the facility and surroundings in which they will be teaching.

### ***How will facilitator trainees learn to teach the course?***

Three methods will be used to demonstrate and practise facilitator techniques:

- **The course director acts as a facilitator.** Facilitator trainees observe appropriate facilitator behaviours as the course director introduces a module, provides individual feedback, does a demonstration, leads a group discussion, coordinates a role play, etc.
- **A facilitator trainee acts as a facilitator speaking to a group of participants.** After the course director has introduced and demonstrated a group teaching activity (such as leading a group discussion), facilitator trainees practise the technique. For example, facilitator trainees introduce a module, lead a group discussion, or coordinate a role play. While practising, the trainees also demonstrate these teaching activities for the others in the group. For some teaching activities, it is suggested that two trainees practise together, acting as co-facilitators. This will allow them to practise working in pairs, as they will in the course. After every activity, it is important to discuss the trainees' performance and give feedback.
- **One trainee acts as a course participant and another acts as a facilitator providing individual feedback.** Both sit at the front of the room, positioned as a facilitator and participant would be. The facilitator trainee is both practising and demonstrating individual feedback. The facilitator trainee checks the "participant's" answers, asks questions to ensure understanding of the exercise, and mentions all the major points specified in the *Facilitator Guide*.

(Note: Situating these two individuals apart from the rest of the group is important because it clearly shows that giving individual feedback is different from leading a group discussion. In the past, individuals have not understood the individual feedback procedure until they have observed and participated in it. If facilitator trainees are told that feedback should be given individually but they never practise it or see it done, they are unlikely to provide it during the course.)

By the end of facilitator training, every trainee should have practised each facilitator technique. A Practice Assignment Grid is provided on page 53 (last page of section 5.3) to help the course director ensure that each trainee has adequate practice. Make a copy of this grid, and list the names of the trainees. Whenever someone practises a technique, make an entry on this grid.

## 5.2 Preparing a schedule for full facilitator training

A possible schedule for the full-length facilitator training begins on the next page. Guidelines follow the schedule. The 3½-day facilitator training focuses on teaching skills to be used in the classroom. The final half-day is used to finish work on the modules and to arrange the classrooms for the course.

This schedule can be used to make a more precise schedule, including specific dates and times, once you know the times and arrangements for lunch, tea breaks, etc. When adapting this schedule, keep the following points in mind:

- The schedule is 3½ working days. Seven working hours have been scheduled each day. It is assumed that an additional 1–1½ hours will be needed for lunch and tea breaks.
- Facilitator training is critical to the success of the training. The 3½-day schedule is very full. Facilitator trainees will review in only 3½ days what they will teach to course participants in 5 days. Do not try to shorten the schedule.
- The schedule will require facilitators to work in a concentrated way. Modules will be reviewed very quickly, and homework will be required each night. (This is different from a course, where participants are **not** given homework.)
- Classroom time will focus on discussion and practice of facilitator techniques, such as individual feedback, leading discussions, etc.
- The schedule should be flexible. If work is completed ahead of schedule on a certain day, facilitator trainees should begin work on the next module. If work takes too long, extra homework can be assigned, or some activities delayed until the next day.
- Reserve time on the last day for arrangements such as discussion of the schedule for the course, assignments of classrooms, and distribution of instructional materials and supplies.
- Before the end of facilitator training, assign pairs of facilitators to work together, and designate classrooms. This will allow the facilitator pairs time to organize their rooms and plan how they will work together.

There should be at least one complete day off before the course to allow facilitators to rest.

(Note: From time to time, you will need to remind facilitator trainees that the course will **not** be conducted the way that facilitator training is conducted. During the course, participants will read a section of the module, do an exercise, receive feedback, etc., in the order described in the *Facilitator Guide*. Homework is **not** recommended during the course. Refer to the *Facilitator Guide* and the actual course schedule (based on page 19) frequently, so everyone understands how the actual course will differ from facilitator training.)

## ***Suggested schedule for full facilitator training***

<b>Facilitator training day 1</b> <i>(Guidelines follow on pages 30–40)</i>	
<b>Activity</b>	<b>Time</b>
1. Opening session A. Introductions B. Administrative tasks C. Review of purpose of the course	0.5 hour
2. Introduction to facilitator training A. Context of facilitator training B. Materials needed C. Objectives of facilitator training D. Teaching methods E. Schedule for facilitator training F. Introduction of <i>Facilitator Guide</i>	0.75 hour (45 minutes)
3. Module A: <i>Introduction</i> A. Review and demonstration B. Facilitator technique: Working with a co-facilitator	0.5 hour
4. Module B: <i>Detect Cases of TB</i> A. Facilitator technique: Introducing a module B. Reading and work on module through Exercise A C. Facilitator technique: Coordinating role plays D. Reading and work on module through Exercise B E. Facilitator technique: Individual feedback F. Reading and work on rest of the module G. Concluding the module	3.5 hours
5. Module C: <i>Treat TB Patients</i> A. Reading and work on the module through Exercise A B. Practice of facilitator techniques	1.5 hours
6. Assignments for the next day – Read and work through Exercise C in module C: <i>Treat TB Patients</i> – Read corresponding facilitator guidelines – Prepare for assigned activities	<i>completed as homework</i>

<b>Facilitator training day 2</b> <i>(Guidelines follow on pages 41–45)</i>	
<b>Activity</b>	<b>Time</b>
1. Continuation of module C: <i>Treat TB Patients</i> A. Facilitator technique: Conducting a demonstration B. Practice of facilitator techniques C. Facilitator technique: Leading a discussion D. Facilitator technique: While participants are working E. Reading and work on rest of the module F. Practice of facilitator techniques	3.5 hours
2. Module D: <i>Inform Patients about TB</i> A. Reading and work on the module through Exercise C B. Practice of facilitator techniques C. Reading and work on rest of the module D. Concluding the module	3.5 hours
3. Assignments for the next day –Read and work to the end of module E: <i>Identify and Supervise Community TB Treatment Supporters</i> –Read corresponding facilitator guidelines –Prepare for assigned activities	<i>completed as homework</i>

<b>Facilitator training day 3</b> <i>(Guidelines follow on pages 46–48)</i>	
<b>Activity</b>	<b>Time</b>
1. Module E: <i>Identify and Supervise Community TB Treatment Supporters</i> A. Practice of facilitator techniques B. Concluding the module	2 hours
2. Module F: <i>Manage Drugs and Supplies for TB</i> A. Group practical exercise – drug boxes B. (If needed) Preparing drug boxes for the course	2 hours
3. Module G: <i>Ensure Continuation of TB Treatment</i> A. Reading and work on the module through Exercise A; practice of facilitator technique B. Reading and work on rest of the module; practice of facilitator technique	2.5 hours
1. Introduce module H: <i>Monitor TB Case Detection and Treatment</i>	0.5 hour
2. Assignments for the next day –Read and work to the end of module H –Read corresponding facilitator guidelines –Prepare for assigned activities	<i>completed as homework</i>

**Facilitator training day 4 (half-day)**  
*(Guidelines follow on pages 49–51)*

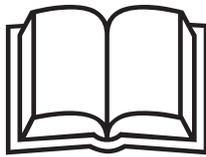
<b>Activity</b>	<b>Time</b>
1. Module H: <i>Monitor TB Case Detection and Treatment</i> A. Practice of facilitator techniques B. Reading and work on rest of the module; group discussion C. Facilitator techniques: Review	3 hours
2. Practical arrangements for the course	0.5 hour
3. Closing remarks to facilitators	
4. Co-facilitators discuss plans for first day; arrange classroom if possible	2 hours

### 5.3 Using this guide to conduct the full facilitator training

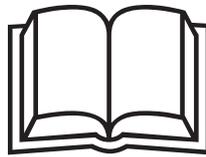
As a course director, you should be familiar with this course and have experience as a facilitator in this course or similar courses. To prepare to teach others to be facilitators, read this guide, and reread and study the *Facilitator Guide*.

When conducting the full facilitator training, keep available the schedule on pages 26–28 for an overview of the steps to be accomplished each day.

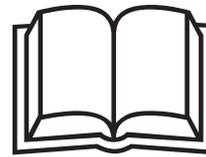
This section gives instructions, day by day and step by step, for conducting facilitator training. Just turn to the appropriate day, and follow the instructions. Some instructions tell you to go to the *Facilitator Guide* and do certain steps described there. When you do that, leave *How to Organize Training for Health Facility Staff on TB Control* open to keep your place. When you have finished the steps in the *Facilitator Guide*, look back to *How to Organize Training for Health Facility Staff on TB Control* to find out what to do next. You will have two guides and a module open at the same time, as shown below:



*How to Organize Training  
for Health Facility Staff  
on TB Control*



*Facilitator Guide*



*Module*

Instructions for the first day of facilitator training begin on the next page.

# FACILITATOR TRAINING DAY 1

## 1. Opening session

*Examples of slides or overhead transparencies to accompany this opening session are provided throughout this section. The slides may be used in a PowerPoint presentation, for which a disk is provided with this course, or they may be made into transparencies for use with an overhead projector. Full-page images for photocopying onto transparency film are provided in section 5.4.*

### A. Introductions

Introduce yourself as the course director and write your name in large letters on a blackboard or flipchart. Ask the facilitator trainees to introduce themselves and write their names under yours on the flipchart. They may also wish to share other information about themselves.

### B. Administrative tasks

Make any necessary announcements regarding meals, transportation, payments, hotel arrangements, etc.

### C. Review of purpose of the course (Slide 1)

This training course will eventually be used in many countries. The purpose is to teach the TB case detection and treatment guidelines recommended by WHO. The course is intended for health workers who are responsible for detecting and managing patients with TB. These health workers may include health assistants, medical assistants, nurses, clinical assistants, clinicians, or physicians. Some may be private practitioners.

#### **Management of Tuberculosis Training for Health Facility Staff**

Teaches TB case detection and management procedures recommended by WHO  
For health workers responsible for detecting and managing patients with TB (including health assistants, medical assistants, nurses, clinical assistants, clinicians, or physicians)  
Health workers may work at health centres, hospitals, outpatient departments, dispensaries or health posts (all called "health facilities" in course)

Health workers may work at health centres, hospital outpatient departments, dispensaries, or health posts. Throughout this course, the term "health facility" is used to include all of these types of health services that deliver outpatient care.

In most health facilities, TB control is integrated with other health services as part of general health care delivery. TB patients are received along with other types of patients. Improving TB management is part of improving health care in general.

The course will teach the skills and knowledge specifically needed to detect pulmonary TB cases, manage drug therapy for TB patients, inform patients about TB, and monitor the success of TB case detection and treatment at the health facility level. The course will not teach basic medical techniques that are already familiar to health workers, such as how to give injections or sterilize needles and syringes.

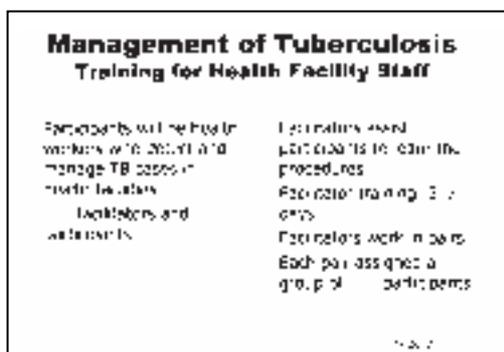
It is expected that participants will return to their health facilities and make changes to improve TB case detection and management.

## 2. Introduction to facilitator training

### A. Context of facilitator training (Slide 2)

Cover the following points:

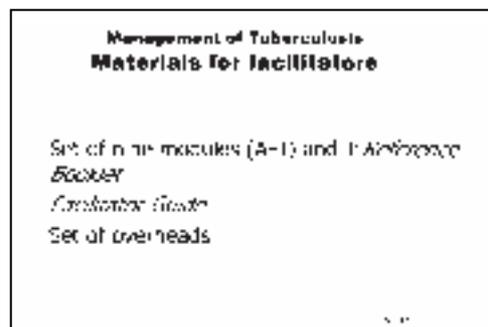
- There will be (*number*) participants attending the course titled *Management of Tuberculosis: Training for Health Facility Staff*, (*dates*).
- The participants will be health workers who detect and manage TB cases in health facilities.
- All of you (*number*) will be facilitators to assist participants to learn the skills presented in the course materials. These 3½ days are your time to work through the materials and prepare to teach others.
- As facilitators, you will work in pairs to teach the course. Each pair will be assigned a group of about (*number*) participants. Pairs for the course will be assigned later. During facilitator training, each of you will work with a number of other trainees.



### B. Materials needed (Slide 3)

Give each facilitator the following materials. Explain that participants will be given modules one at a time but that you are giving facilitators the modules all at once so that they may work ahead.

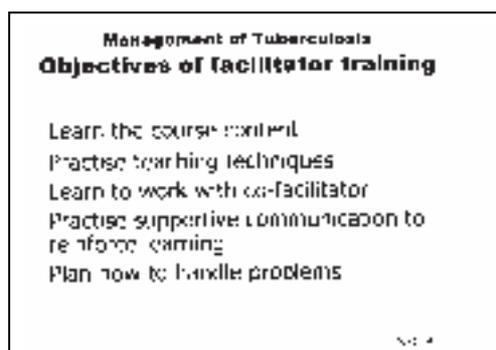
- Set of nine modules (A–I) and J: *Reference Booklet*
- *Facilitator Guide*
- Set of overhead transparencies



Answer sheets for the exercises are included in the *Facilitator Guide*. Separate answer sheets will be given to each participant to be collected in a packet.

### C. Objectives of facilitator training (Slide 4)

- Learn the course content.
- Practise the teaching techniques used with the modules (for example, giving individual



feedback, leading group discussions, coordinating role plays).

- Learn ways to work effectively with a co-facilitator.
- Practise communicating in supportive ways that reinforce learning.
- Discuss problems that may arise during the course (for example, slower readers, logistic difficulties, or sections of a module that may be difficult to teach) and prepare to handle these difficulties.

Facilitator training is far more than learning the content of the course materials: it is also learning teaching techniques.

#### **D. Teaching methods (Slide 5)**

Explain that the teaching methods of this course are based on several assumptions about learning.

1. *Instruction should be performance-based.*

Instruction should teach the tasks that the participant will be expected to do on the job. This course is developed based on an analysis of tasks involved in detecting and managing TB cases. Each module teaches the knowledge and skills needed to perform some of these tasks. At the beginning of each module is a list of learning objectives describing the tasks taught in that module.

2. *Active participation increases learning.*

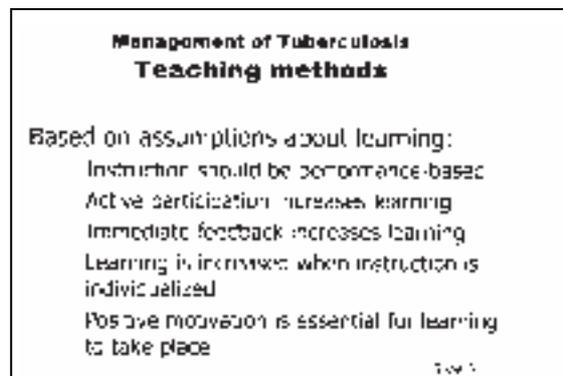
Participants learn far more quickly and efficiently by actually doing a task than by just reading or hearing about it. Practice helps participants remember more and keeps them interested and alert. This course actively involves the participants in written exercises, group discussions, and role plays.

3. *Immediate feedback increases learning.*

Feedback is information on how well the participant is doing. A participant who does well on an exercise and is reinforced immediately is more likely to retain what has been learned. Immediate feedback also allows misunderstandings to be corrected before they become strong beliefs, or before the participant becomes further confused. In this course, the facilitators give immediate feedback on each exercise, tailored to each participant's needs. Feedback is provided through group discussion or individual consultation.

4. *Learning is increased when instruction is individualized.*

Participants attending this course will learn at different speeds and in different ways. For maximum learning to occur, the instruction must be flexible enough to



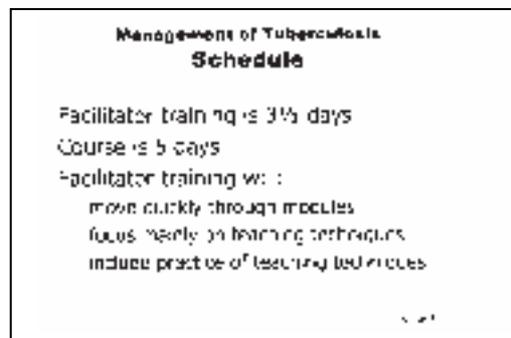
allow each participant to proceed at a comfortable pace. Each participant should ask questions and receive explanations to the extent necessary to understand and acquire the skill and knowledge. This course is structured to enable the participants to do the exercises at a comfortable pace and then to discuss any problems or questions with a facilitator.

5. *Positive motivation is essential if learning is to take place.*

Participants must want to learn for instruction to be effective. Most of the time, participants come to a course highly motivated. Facilitators help the participants to maintain this motivation by providing individual attention, giving prompt feedback, reinforcing them for their work on the exercises, ensuring that they understand each exercise, and encouraging them in group activities.

**E. Schedule for facilitator training (Slide 6)**

Distribute a written schedule for facilitator training based on the one given on pages 26–28. Explain that this 3½-day schedule is very much condensed from the full 5-day course. Give facilitator trainees a copy of the actual course schedule as well, so that they can compare the activities and pace of the actual course with those of facilitator training. Explain that the actual course schedule is based on the one provided at the end of the *Facilitator Guide* on page All-9.



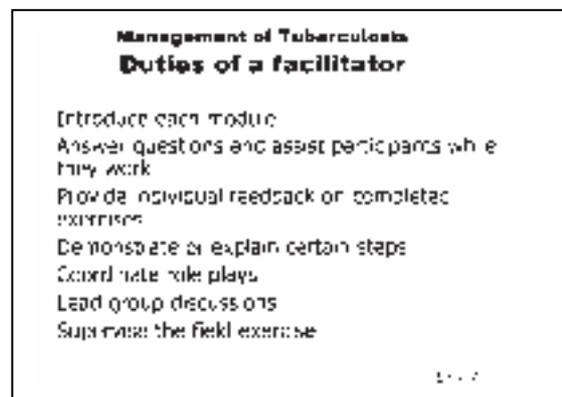
Explain that facilitator trainees will move very quickly through the modules and will focus mainly on teaching techniques.

**F. Introduction of Facilitator Guide (Slides 7 and 8)**

Trainees will learn to use the *Facilitator Guide* during the 3½-day training.

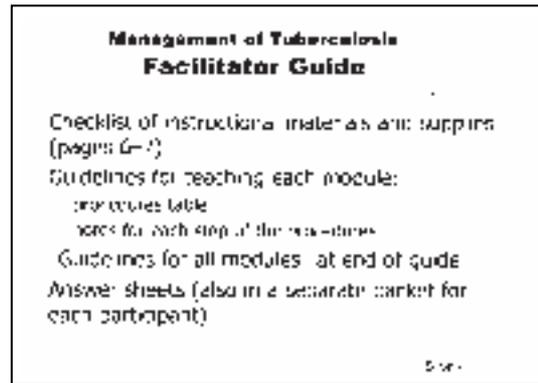
1. Ask trainees to read pages 1–5 of the *Facilitator Guide*— a description of the roles and responsibilities of a facilitator.
2. Answer any questions about pages 1–5. Then, briefly summarize the major duties of a facilitator (**Slide 7**):

- to introduce the modules,
- to answer questions and assist participants while they work,
- to provide individual feedback on completed exercises,
- to demonstrate or give explanations of certain steps,
- to coordinate role plays,
- to lead group discussions,
- to supervise the field exercise.



3. **(Slide 8)** Urge facilitator trainees to follow procedures in the *Facilitator Guide* and make the points specified. Review the parts of the *Facilitator Guide*:

- checklists of instructional materials and supplies needed (pages 6–7 of *Facilitator Guide*),
- procedures table for each module,
- notes for each step of the procedures, and
- the section of “Guidelines for All Modules” at the end of the *Facilitator Guide*.



4. Point out that answer sheets for the exercises are provided in the *Facilitator Guide*. Copies are also provided in a separate packet for each participant. The facilitator will give answer sheets one at a time to each participant after feedback. Participants may keep their loose answer sheets in a folder or envelope that should be provided with the course supplies.

You may want to write the message “Remember to use your *Facilitator Guide*” on a flipchart page and leave the message visible throughout the training. Encourage trainees to write notes in their guides about important points to make during the course.

### 3. Module A: Introduction

#### A. Review and demonstration

Ask facilitator trainees to open page A-1 of the *Facilitator Guide*. Point out the procedures table and the corresponding notes. Ask the group to follow along as you use the notes to lead them through module A: *Introduction*.

Follow the procedures closely, but save time by asking trainees to review the contents of the module quickly rather than reading carefully. Since trainees have already introduced themselves, simply mention the step of introductions rather than doing it.

If you have an assistant, turn to your assistant for help in remembering to include all of the relevant points. For example, ask aloud, “Have I forgotten anything?” In this way, you will demonstrate one way of working together as co-facilitators.

When you have finished, tell the group that you have just demonstrated most of the procedures for module A: *Introduction*. Answer any questions about how to use the *Facilitator Guide*.

## **B. Facilitator technique: working with a co-facilitator**

Explain that there are several ways that co-facilitators can help each other and work together as a team. For example, while one facilitator is leading a discussion, introducing the module, or doing a demonstration, the other facilitator can:

- record information on the flipchart,
- follow along in the *Facilitator Guide* to ensure that no important points are omitted, and
- politely add certain points if necessary.

When first assigned to work together, co-facilitators should take time to talk about previous teaching experiences and individual strengths and weaknesses. They should agree on roles and responsibilities and on how to work together as a team.

Suggestions for working together as co-facilitators:

1. Discuss in advance how to work together on exercises and other activities. Review the teaching activities for the next day, and agree who will prepare for each demonstration, lead each discussion, collect supplies, etc. Do not divide your work with the attitude that “this is your piece and this is mine”. Be flexible and ready to adjust roles if needed.
2. Work together on each module rather than taking turns at having sole responsibility for a module. During each module, you will at some times be the leader and at other times the helper, writing on the flipchart, etc.
3. After exercises requiring individual feedback, both facilitators should be available to give feedback, so that participants do not have to wait long.
4. When leading a discussion, always try to ask the opinion of your co-facilitator. For example, ask, “Dr King, do you have something to add?” or “Would you agree with this explanation?”
5. When you are assisting, be respectful and polite. Give your co-facilitator your full attention. If you need to add information, wait until a suitable point in the presentation. Then politely ask, “Do you mind if I add something here?” Or say, “Excuse me, there is one more point I would like to mention”.
6. Avoid directly contradicting your co-facilitator in front of the group. If you think that your co-facilitator is doing a demonstration incorrectly or is giving incorrect information, say, “Excuse me, but may I clarify that?” If the situation is more complicated, quickly excuse yourselves, discuss the error privately, and decide how to clarify the explanation or demonstration to the group. The group must be given correct information as soon as possible. A serious disagreement between you and your co-facilitator may require help from the course director.

During facilitator training, pairs of trainees will practise working together on group discussions and other exercises. When given an assignment, each pair should discuss in advance how to work together.

## 4. Module B: Detect Cases of TB

Facilitator trainees will now begin module B: *Detect Cases of TB*. During facilitator training, facilitators must work quickly. In contrast, in the actual course, facilitators should not rush participants through the materials but should allow them to proceed at a comfortable pace. Homework is **not** recommended during the course, as participants will be tired at night.

### A. **Facilitator technique: introducing a module**

Demonstrate introducing module B as described on page B-2 of the *Facilitator Guide*. This includes an important explanation of the icons and instructions that will guide participants through all of the modules (the **stop sign**, **go back arrow**, etc.).

Ask trainees to notice the instructions for introducing the module as you speak. Explain that from now on you will ask one of them to introduce each module. Tell them to keep their introductions brief (just a few remarks of 1–3 minutes). They should not lecture on the content on the module but should cover the points in the *Facilitator Guide*.

### B. **Reading and work on module through Exercise A**

Ask trainees to quickly read pages 1–9 of the module, then turn to page 25 and read the instructions for Exercise A, which is a role play exercise. While trainees are reading, be sure that you have enough sputum containers ready for the exercise. (See page B-3 of the *Facilitator Guide*.)

Following carefully the instructions given in the *Facilitator Guide* on pages B-3 and B-4, act as a facilitator, and conduct the role play exercise as if the facilitator trainees were participants in the course. You are modelling how to lead this exercise.

### C. **Facilitator technique: coordinating role plays**

After the role play exercise and discussion, point out the guidelines that you followed on pages B-3 and B-4 of the *Facilitator Guide* to lead the exercise. Draw attention to the tasks that you did as a coordinator; for example, obtain props, assign roles, etc.

Then ask trainees to turn to page All-8 near the end of the *Facilitator Guide* (in the pages that apply to all modules). Discuss each point on page All-8 and answer any questions. Also review the following points:

- Role plays will not (and should not) be perfectly prepared and rehearsed performances. The point of role plays is to practise accomplishing certain steps in an interaction while communicating effectively.
- The role play exercises are designed so that each participant will have the chance to play the part of the health worker. Participants will be asked to change roles during the exercise.
- The persons first playing the role of the health worker should be encouraged to review the information provided in the module about the role play situation, as well as relevant sections of the module, or the communication skills to be used. The

facilitator should ensure that participants understand the purpose of the role play and the steps or points that the health worker should cover.

- The persons playing roles should behave realistically, incorporating any background information given about the role. Players may make up additional information if necessary, as long as it is realistic and consistent with the background information.
- It is important to look ahead in the guide to see when role plays will occur and to prepare for them. Some role plays require supplies such as drug boxes or sputum containers. These supplies will be listed in the instructions for the exercise. Explain where these supplies are stored.

Tell trainees that they will have opportunities to coordinate role play exercises during the next few days. Use the Practice Assignment Grid (page 53) to keep a record of who has coordinated role play exercises.

#### **D. Reading and work on module through Exercise B**

Tell trainees to refer to the procedures table on page B-1 of the *Facilitator Guide*. Point out that, after completing Exercise A, participants will read pages 10–17 of the module and will then do Exercise B as individual work. Ask trainees to do this reading and complete Exercise B now.

#### **E. Facilitator technique: individual feedback**

When trainees have finished Exercise B, refer again to page B-1 of the *Facilitator Guide*, and point out that Exercise B requires individual feedback, as indicated in the “Feedback” column of the table. Point out the related notes on pages B-4 to B-5 and the answers on pages B-6 and B-7. Also show trainees a separate packet of answer sheets. Explain that each participant will have a packet from which the facilitators will obtain the appropriate answer sheet after each exercise.

Explain that individual feedback is done by one facilitator talking to one participant privately. Each facilitator should set up a place in a separate area where participants can come to them for individual feedback. Co-facilitators should both be available to give individual feedback so that participants do not have to wait long.

Ask for a volunteer to act as a “course participant” who has just completed Exercise B. The participant will show you answers written in the module. (For realism, the participant may make up a wrong answer or two.) You will act as the facilitator, modelling the technique of giving **individual feedback**. Sit face to face with the participant at the front of the room and speak clearly so that everyone can “overhear”. Follow the guidelines in the *Facilitator Guide*, pages B-4 and B-5.

After modelling individual feedback, ask facilitator trainees to turn to page All-6 of the *Facilitator Guide*. It explains what facilitators should do when giving individual feedback. Review each point on that list. Then review the additional points below:

- If space allows, provide individual feedback away from the group, in order to avoid disturbing others and to give the participant some privacy. For example, one

facilitator could set up chairs in the hall, while the other facilitator sets up chairs in the corner of the room.

- Individual feedback may be fairly brief. During the course, individual feedback may not be as complete and lengthy as it is during facilitator training, when you are learning how to provide feedback.
- Sometimes the guidelines for feedback on an exercise suggest a question to ask about the participant's own health facility and its procedures. For example:
  - How do you detect TB cases at your health facility now?
  - What do you do when a TB patient fails to come for treatment?

When these questions are suggested, ask them and listen carefully to the participant's answers. You will understand the participant's situation better and may help the participant think through any concerns.

- You will have a chance to practise giving individual feedback during this training. You will review a "participant's" answers. You will practise consulting the guide and mentioning any key points related to the exercise. However, the questions and comments of the individual acting as the participant may not be similar to those encountered during the course. Actual participants are likely to be more shy and may read or understand less quickly.

#### **F. Reading and work on rest of the module**

As instructed by the arrows in the module, trainees should go back to page 17 of the module and read section 7 and the Summary of Important Points (page 19).

Explain to trainees the purpose of the self-assessment questions that appear at the end of each module. Use the explanation on page B-5 of the *Facilitator Guide*, then draw the attention of the trainees to this explanation.

Ask trainees to do the self-assessment questions and check their own answers.

#### **G. Concluding the module**

Conclude the module as instructed on page B-8 of the *Facilitator Guide*.

Tell trainees that you have led this module as if you were the facilitator in the course and they were the participants. In the next module, they will have opportunities to act as the facilitator.

### **5. Beginning module C: Treat TB Patients**

Point out the procedures for the module on page C-1 of the *Facilitator Guide*. Facilitators will follow these procedures during the course. However, to save time during facilitator training, much of module C: *Treat TB Patients* will be done as homework. Trainees will begin reading and working on the module now.

### **A. Reading in the module; demonstration of Case 1, Exercise A**

Ask facilitator trainees to read pages 1–6 and work up to Exercise A (on page 61) of module C: *Treat TB Patients*.

Referring to the procedures table on page C-1 of the *Facilitator Guide*, point out that Case 1 of Exercise A should be done as a demonstration for the participants, before they attempt the exercise. Point out the guidelines for the demonstration on page C-2.

Lead the group through Case 1, Exercise A, as a demonstration.

### **B. Work on Exercise A; practice of facilitator techniques**

Next, facilitator trainees will complete Cases 2–4 of Exercise A individually. Assign facilitator trainees to be prepared to practise individual feedback on Exercise A in front of the group. Assign one person to act as the “facilitator” and one person to act as the “participant”. During facilitator training, each trainee should have an opportunity to be the “facilitator” giving individual feedback. After each trainee has had a turn, if you feel that all are well prepared to give individual feedback, you may stop assigning it to be practised aloud.

Write the names of the facilitator trainees given the assignment on the lines below. Also keep track of assignments on the Practice Assignment Grid on page 53.

\_\_\_\_\_ Individual feedback, Exercise A, Cases 2–4 (pages C-2 and C-3 of the *Facilitator Guide*) Participant: \_\_\_\_\_

When everyone has finished doing Cases 2–4, have the assigned “facilitator” give individual feedback on Cases 2–4 to the assigned “participant” in front of the group.

During all practice of teaching techniques, trainees should refer to the *Facilitator Guide* to see whether all the points are covered. After the practice, discuss what was done well and what could be improved. Refer frequently to the *Facilitator Guide*, so trainees stay aware of the order of events that they will follow during the real course.

Keep the focus on teaching techniques, but also clarify any confusion about module content if necessary. Refer to the Performance criteria for facilitators on page 85 of this guide while providing feedback.

## **6. Assignments for the next day**

Ask facilitator trainees to read pages 7–30 and work through Exercises B and C of module C: *Treat TB Patients*. Remind facilitators that this is **NOT** how the work will be done in the actual course; **participants will not have homework**. Facilitators should also carefully read the corresponding guidelines in the *Facilitator Guide*.

Assign facilitator trainees to be prepared to practise specific teaching activities (listed below) in front of the group. Keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Individual feedback, Exercise B, Cases 2–4 (pages C-4, C-6, C-7, and C-8 of the *Facilitator Guide*) Participant: \_\_\_\_\_ (*Explain that you will do Case 1 as a demonstration yourself.*)

\_\_\_\_\_ Exercise C, individual feedback only, pages C-9 and C-10 of *Facilitator Guide*. Participant: \_\_\_\_\_ (*Explain that you will lead the group discussion yourself.*)

Explain that trainees will practise the teaching activities in the order that they appear in the *Facilitator Guide*. It is essential that they do the assigned reading, work the exercises, and prepare for their assigned activities tonight.

***Note to course director on preparations for the next day:***

Review relevant pages of this guide, the *Facilitator Guide*, the rest of module C, and modules D and E.

Make arrangements to have available an overhead projector and a transparency of the *TB Treatment Card* for the demonstration in Exercise B of module C: *Treat TB Patients*. (If there is no overhead projector, use an enlarged photocopy of the *TB Treatment Card*.)

Have a couple of drug boxes ready for use in role plays in module D: *Inform Patients about TB*. (See page D-6 of the *Facilitator Guide*.)

## FACILITATOR TRAINING DAY 2

### 1. Continuation of module C: Treat TB Patients

Confirm that trainees have done their homework. Remind trainees that they were asked to do homework in order to fit the facilitator training into 4 days. Participants in the course will **not** have homework, and all work on modules will be done in the classroom.

Refer to page C-1 of the *Facilitator Guide* and remind trainees that you will be starting with step 4 of the procedures. They should assume that participants have read through page 20 of the module and are ready to begin Exercise B.

#### **A. Facilitator technique: conducting a demonstration**

Point out that Exercise B begins with a demonstration of Case 1 using an overhead projector (if possible). Following the guidelines on page C-4 of the *Facilitator Guide*, lead the group through Case 1.

After the demonstration, explain that:

- A demonstration shows or explains a complex task described in the module. The purpose is to help the participant understand more easily when they read the text or do the related exercise.
- A demonstration may be easier to understand for some participants who have difficulty reading or who are more used to listening to oral presentations than reading.
- The *Facilitator Guide* describes how to do the demonstration. Follow the guide closely; do not explain more than is included in the instructions. It may be confusing if you go beyond the next step that participants will learn in the module.
- Speak clearly and loudly enough. Do not turn your back to participants as you speak. Speak in a conversational tone, varying the pitch and speed of your voice.
- Even if you have seen other facilitator trainees do the demonstration, you need to practise the demonstration before doing it in front of your group during the course. It is especially important to practise with the overhead projector.

Show trainees how to turn the overhead projector on and off. Explain where it will be stored during the course.

#### **B. Practice of facilitator techniques**

Ask the assigned trainee to give individual feedback to the assigned “participant” on Cases 2–4 of Exercise B in front of the group. After the practice, discuss what was done well and what could be improved. Answer any questions about module content.

Next, have the assigned trainee give individual feedback on Exercise C. As always, provide constructive feedback after practice.

Demonstrate how to lead the group discussion in Exercise C, being careful to use good facilitator techniques and to follow the steps in the *Facilitator Guide*, page C-9.

**C. *Facilitator technique: leading a discussion***

Point out that Exercise C required participants to write answers to questions before the discussion. Most discussions in this course require some individual work first, so that participants can organize their thoughts and prepare to share their ideas.

Ask trainees to turn to page All-7 of the *Facilitator Guide*. This page gives general guidelines for leading a discussion. Review the points on page All-7. Explain that from now on trainees will practise leading the group discussions.

**D. *Facilitator technique: while participants are working***

Looking at the procedures on page C-1 of the *Facilitator Guide*, point out that participants have much independent reading and work, including the self-assessment questions at the end of the module. Facilitators should be available to help during this individual work, if needed.

Ask facilitator trainees to look at page All-5 of the *Facilitator Guide*. Review each point on the list. Also mention the following points:

- Watch participants as they begin an exercise to ensure they understand what to do. A participant who takes a long time to understand the instructions for an exercise or who misunderstands the instructions can use a lot of time and become frustrated. If you observe such difficulty, offer help immediately.
- Look to make sure that participants are actually doing the self-assessment exercises. They must do these self-checked exercises and not simply read the answers that follow.
- If a participant is having trouble, quietly give some brief help. Try not to disturb other participants. A participant who misses any of the self-assessment questions should review the related part of the module.

**E. *Reading and work on rest of the module***

Ask trainees to read and work through the end of the module. They should check their own answers to the exercises and the self-assessment questions.

Assign the following activities to be practised in front of the group. Keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Exercise D, individual feedback, pages C-11 through C-13 of *Facilitator Guide*. Participant: \_\_\_\_\_

\_\_\_\_\_ Exercise E, individual feedback, pages C-14, C-15, and C-16 of *Facilitator Guide*. Participant: \_\_\_\_\_

**F. Practice of facilitator techniques**

When everyone is ready, have the assigned trainees give individual feedback on Exercises D and E. As always, provide constructive feedback after practice.

Answer any questions that trainees may have about TB treatment, and conclude the module.

**2. Module D: Inform Patients about TB**

Point out the procedures for this module on page D-1 of the *Facilitator Guide*. Unless trainees have previously taken the course as participants, they have not yet had time to read this module, so they will read and work the exercises now, stopping to do the group activities.

As soon as all trainees have practised giving individual feedback, it is no longer necessary to assign trainees to give individual feedback in front of the group. At that point, trainees should check their own answers to written exercises and come to you with questions as needed.

**A. Reading and work on the module through Exercise C**

Ask trainees to read pages 1–10 of the module and do Exercises A and B. Assign the following activities to be practised in front of the group. (Assign individual feedback only if needed.) Keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Introducing the module, page D-2 of *Facilitator Guide*

\_\_\_\_\_ Exercise A, individual feedback, pages D-2 and D-3 of *Facilitator Guide*. Participant: \_\_\_\_\_

\_\_\_\_\_ Exercise B, individual feedback, pages D-4 and D-5 of *Facilitator Guide*. Participant: \_\_\_\_\_

\_\_\_\_\_ Exercise C, role play coordinator, page D-6 of *Facilitator Guide*.

\_\_\_\_\_ Demonstration using script in annex of module, pages D-6 and D-7 of *Facilitator Guide*. (Assign two people.)

**B. Practice of facilitator techniques**

When everyone is ready, have trainees practise the assigned activities. As always, provide constructive feedback after practice.

To save time in the role play exercises during facilitator training, it is not necessary to change roles and do them three times. However, make sure that trainees understand that

during the actual course, every participant should have a turn to be the health worker in each role play.

### **C. Reading and work on rest of the module**

Ask trainees to finish module D: *Inform Patients about TB*, writing and checking their own answers to Exercise E and the self-assessment questions. Note that role play Exercise D (informing patients about HIV and TB) is optional. Decide whether this exercise is needed and suitable for the area in which the course will be given. Assign this exercise only if it will be done during the course.

\_\_\_\_\_ Optional Exercise D of module D: *Inform Patients about TB*, role play coordinator, page D-7 of *Facilitator Guide*.

It is assumed that by now everyone has practised individual feedback, so it will not be necessary to practise Exercise E in front of the group.

### **D. Concluding the module**

If Exercise D was assigned, ask the designated trainee to conduct the role play.

Point out the guidelines and answer sheet for individual Exercise E (pages D-8 and D-9 of the *Facilitator Guide*). Answer any questions about this exercise. Remind trainees that they will give individual feedback on this exercise even though they are not practising it now. This exercise emphasizes the need to find out the causes of problems before identifying solutions.

Conclude the module as described on page D-10 of the *Facilitator Guide*.

## **3. Assignments for the next day**

Ask trainees to read and work to the end of module E: *Identify and Supervise Community TB Treatment Supporters*. Provide separate copies of *A Guide for Tuberculosis Treatment Supporters* if possible. These may be read instead of Annex B of the module. Trainees should also read section E of the *Facilitator Guide*.

Assign the following activities to be practised in front of the group. Remember to keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Introducing module E: *Identify and Supervise Community TB Treatment Supporters*, page E-2 of *Facilitator Guide*

\_\_\_\_\_ Exercise A of module E, role play coordinator, page E-2 of *Facilitator Guide*

\_\_\_\_\_ Exercise B of module E, role play coordinator, pages E-3 and E-4 of *Facilitator Guide*.

***Notes for course director on preparation for the next day:***

Review relevant pages of this guide and the *Facilitator Guide*, and review modules E, F, and G.

For the role play in Exercise B in module E: *Identify and Supervise Community TB Treatment Supporters*, have available several doses of Category I, initial phase drugs. (See page E-3 of *Facilitator Guide*.) Tell the assigned role play coordinator that you have the drugs.

Drug boxes will be needed for the group practical exercise (Exercise A) in module F: *Manage Drugs and Supplies for TB*. Review your plans for how you want the group exercise done in the course, and be prepared to describe this to the facilitators (see pages F-2 through F-4 of the *Facilitator Guide*). Be sure that adequate numbers of preassembled drug boxes, or supplies to assemble the boxes, will be available.

## FACILITATOR TRAINING DAY 3

### 1. Module E: Identify and Supervise Community TB Treatment Supporters

Point out the procedures for this module on page E-1 of the *Facilitator Guide*. Explain that the group will review the module (done as homework) by discussing and practising the activities in the order that they are listed in the procedures.

#### **A. Practice of facilitator techniques**

Ask facilitator trainees to lead the teaching activities (introducing the module, role play Exercises A and B) assigned the night before. Follow the order of procedures on page E-1 of the *Facilitator Guide*.

To save time in the role play exercises during facilitator training, it is not necessary to change roles and do them three times. However, make sure that trainees understand that during the actual course, every participant should have a turn to be the health worker in each role play.

#### **B. Concluding the module**

Answer any questions on written Exercise C and the self-assessment questions. Conclude the module.

### 2. Module F: Manage Drugs and Supplies for TB

Since trainees have not yet read this module, lead them through the module as if they were participants. Do the activities in order, according to page F-1 of the *Facilitator Guide*.

#### **A. Group practical exercise – drug boxes**

Lead the group exercise according to the *Facilitator Guide* as though you are a facilitator. Conduct the exercise as you want it done during the actual course.

#### **B. (If needed) Preparing drug boxes for the course**

After finishing the module, explain whether or not facilitators will need to prepare drug boxes for use in their small groups during the course. If so, direct them to work in pairs to prepare the drug boxes by following procedures in Annex B of the module. (Note: This task may be done after you have assigned pairs of co-facilitators who will work together during the course.)

### 3. Module G: Ensure Continuation of TB Treatment

Point out the procedures for this module on page G-1 of the *Facilitator Guide*. Unless trainees have previously taken the course as participants, they have not yet had time to read this module, so they will read and work the exercises now, stopping to do the group activities.

#### **A. Reading and work on the module through Exercise A; practice of facilitator technique**

Ask trainees to read pages 1–5 of the module and do Exercise A. Trainees should check their own answers to the first part of the exercise. Assign a facilitator trainee to lead the discussion after the exercise.

\_\_\_\_\_ Group discussion of Exercise A, pages G-2 through G-5 of the *Facilitator Guide*.

When everyone is ready, have the assigned trainee lead the group discussion. As always, offer constructive feedback.

#### **B. Reading and work on rest of the module; practice of facilitator technique**

Ask trainees to read and work to the end of the module, checking their own work on the self-assessment questions. Assign a facilitator trainee to lead the discussion after Exercise B.

\_\_\_\_\_ Group discussion of Exercise B, page G-6 of the *Facilitator Guide*.

When everyone is ready, have the assigned trainee lead the group discussion. As always, offer constructive feedback.

### 4. Introduce module H: Monitor TB Case Detection and Treatment and Summary Worksheet

Introduce module H: *Monitor TB Case Detection and Treatment* before assigning homework. If there is time, also explain the *Summary Worksheet* (as described on pages H-2 and H-3 of the *Facilitator Guide*).

### 5. Assignments for the next day

For homework, ask trainees to read pages 1–11 and work Exercises B through D of module H: *Monitor TB Case Detection and Treatment*. They will not have to do Optional Exercise A, which they completed in an earlier module. The homework may be difficult for some trainees who may have forgotten basic mathematics; offer to be available in case anyone needs help while doing the homework.

Assign trainees to practise the following activities. (Only selected exercises are listed.)  
Assign individuals who are likely to understand the module well and give good explanations.  
You may wish to assign two people to work together as co-facilitators on the explanations.

\_\_\_\_\_ Introducing the module (page H-2 of the *Facilitator Guide*).

\_\_\_\_\_  
\_\_\_\_\_ Explanation of *Summary Worksheet* (using overhead transparency),  
according to the guidelines on pages H-2 and H-3 of the *Facilitator Guide*.  
(Note: Even if you have already done this explanation, assign trainees to  
practise it as well.)

\_\_\_\_\_  
\_\_\_\_\_ Explanation of time line, page H-6 of *Facilitator Guide*. Provide the  
overhead transparency of the time line (two parts, pictured on pages H-15  
and H-16) to trainees who will do this explanation.

***Notes for course director on preparation for the next day:***

Be ready to distribute a final schedule for the course tomorrow. Be ready to explain how the  
Field Exercise will be done.

If you have not already done so, decide when and where daily facilitator meetings will be  
held during the course.

Plan which facilitators will work together as co-facilitators during the course.

Plan which classroom will be used by each pair of facilitators. Ensure that course materials  
will be available to set up the classrooms tomorrow.

## FACILITATOR TRAINING DAY 4

*This is a half-day of facilitator training. After completing the last module, facilitators will need time to arrange their classrooms, discuss how they will work together, etc.*

### **1. Module H: Monitor TB Case Detection and Treatment**

Facilitators should have worked through Exercise D of the module the night before. Point out the procedures on page H-1 of the *Facilitator Guide* and emphasize that participants will do them in this order during the course.

#### **A. Practice of facilitator techniques**

Have trainees practise their assigned teaching activities in front of the group. As always, provide constructive feedback after each practice. After each teaching activity, remind trainees what will happen next in the actual course. (For example, say, “Next, participants will read pages...”) Answer any questions about the content and exercises in the module.

When a facilitator explains the *Summary Worksheet* (using either an overhead transparency or an enlarged copy), review the following points:

- Be sure that all the participants can see the form that you are using. If needed, have the participants move so they can see.
- Be sure to speak clearly and loudly enough. Do not turn your back to participants as you speak.
- Even if you have seen other facilitator trainees do the explanation, you need to practise before doing it in front of your group during the course. Study the guide and then practise what to say so you will not have to read from the guide. If you are using an overhead projector, practise with it.

After the time line explanation, be sure that everyone knows how to work the two parts of the time line overhead transparency and understands the related concepts.

Look to see that trainees have actually completed and written answers to Exercises B, C, and D of the module. Answer any questions related to these exercises. It is critical that the facilitators understand how to complete *Worksheets 1 and 2* and the *Summary Worksheet*.

#### **B. Reading and work on rest of the module; group discussion**

Ask trainees to read to the end of the module and complete Exercises E and F. They should check their own answers to Exercise E and the self-assessment questions.

However, you may wish to stop the group after they finish Exercise E and review the answers as a group, to make sure that everyone understands.

Assign two trainees to lead the discussion of Exercise F as co-facilitators:

\_\_\_\_\_ Exercise F, group discussion, page H-14 of *Facilitator Guide*.

After the discussion of Exercise F, answer any questions and conclude the module.

### **C. Review of facilitator techniques**

Facilitator trainees have now practised all of the techniques they will use in the course. Ask them to turn to pages All-1 through All-4 of the *Facilitator Guide*. These pages describe ways to motivate course participants and improve teaching. Allow about 10 minutes to read these pages. (Note: If there is no time for this reading, ask facilitators to read these pages before the course begins.)

While the group is reading, review the list of “Performance Criteria for Facilitators” given on page 85 of this guide. These are the criteria that you will use when supervising, monitoring, and giving feedback to facilitators during the course. Place an asterisk (\*) by any of the criteria that you feel need to be reinforced with this particular group. When all have finished reading, lead a brief discussion on the reading and on the criteria that you have marked.

Ask facilitators if they would like to discuss any problems that they anticipate may occur in the course. Suggest ways to deal with these problems. Mention that there will be further opportunities for this type of discussion in daily facilitator meetings during the course.

## **2. Practical arrangements for the course**

Explain how the field exercise will work; provide a schedule of visits; and explain about transportation to the health facility. When they have time, facilitators should read module I: *Field Exercise* and related guidelines in section I of the *Facilitator Guide*. The field exercise will be discussed in more detail during a facilitator meeting during the course.

If you have not already done so, announce assignments of facilitator pairs who will work together during the course. Give facilitators the written schedule for the course.

Inform facilitators that lists of the participants in each group will be prepared on the first morning as soon as participants have registered. Facilitators will be given a copy of the *Course Registration Form* for each participant in their groups.

Tell facilitators which classrooms they will use. Tell them when and where they can obtain the course materials for their group, or when the materials will be delivered to their classrooms. Tell them when they can go to their classrooms to:

- arrange the tables, chairs, and materials,
- arrange a place for individual feedback.

If facilitators are expected to assemble drug boxes for their small group and they have not yet done so, remind them and tell them where to obtain the supplies.

Remind facilitators to discuss with their co-facilitators how they will divide the work for the first few sessions.

Tell facilitators whom to contact if they need extra supplies or materials during the course.

Remind facilitators where the overhead projector, and any other shared equipment, will be stored during the course.

Answer any questions about practical arrangements.

### **3. Closing remarks to facilitators**

Tell facilitators when the daily facilitator meetings will be held. Explain the objectives of these brief meetings, which are:

- To assess progress made by each group and identify any problems. To agree on actions to solve each problem.
- To discuss techniques that some facilitators found useful and that can be recommended to others (for example, techniques for leading a group discussion, providing individual feedback, or demonstrating use of a form).
- To prepare for the next day (for example, to review points to be emphasized in modules, prepare for the field exercise, discuss any modifications that may be needed in the schedule).
- To make any necessary administrative announcements.

Tell facilitators that their schedule will be very busy. Encourage *informal* discussions to be held after class hours (for example, to discuss practical applications of course content, potential problems, or other ideas related to the course). Ask facilitators to suggest ways, times, and places that such informal discussions could take place.

If an end-of-course evaluation questionnaire will be used, tell facilitators that they will be given the questionnaire at the end of the course to distribute to participants.

Thank the facilitators for their hard work. Tell them that they will receive certificates along with the course participants at the end of the course.



### Practice Assignment Grid

*(Enter the name of the module and the exercise in which each facilitator trainee practises each skill.)*

Names of facilitator trainees	Individual feedback	Introducing a module	Demonstration	Group discussion	Role play coordinator	Other

**5.4****Overhead transparencies for opening session**

*To prepare overhead transparencies to accompany the opening session of the full facilitator training, photocopy the following eight pages onto transparency film.*

# **Management of Tuberculosis Training for Health Facility Staff**

Teaches TB case detection and management procedures recommended by WHO

For health workers responsible for detecting and managing patients with TB (including health assistants, medical assistants, nurses clinical assistants, clinicians, or physicians)

Health workers may work at health centres, hospital outpatient departments, dispensaries or health posts (all called “health facilities” in course)

Slide 1

# Management of Tuberculosis

## Training for Health Facility Staff

Participants will be health workers who detect and manage TB cases in health facilities  
\_\_\_ facilitators and \_\_\_ participants

Facilitators assist participants to learn the procedures  
Facilitator training: 3½ days  
Facilitators work in pairs  
Each pair assigned a group of \_\_\_ participants

Slide 2

# **Management of Tuberculosis Materials for facilitators**

- Set of nine modules (A–I) and J: *Reference Booklet*
- *Facilitator Guide*
- Set of overheads

## **Management of Tuberculosis**

# **Objectives of facilitator training**

- Learn the course content
- Practise teaching techniques
- Learn to work with co-facilitator
- Practise supportive communication to reinforce learning
- Plan how to handle problems

# Management of Tuberculosis

## Teaching methods

Based on assumptions about learning:

- Instruction should be performance-based
- Active participation increases learning
- Immediate feedback increases learning
- Learning is increased when instruction is individualized
- Positive motivation is essential for learning to take place

Slide 5

## **Management of Tuberculosis Schedule**

- Facilitator training is 3½ days
- Course is 5 days
- Facilitator training will:
  - move quickly through modules
  - focus mainly on teaching techniques
  - include practice of teaching techniques

Slide 6

## **Management of Tuberculosis**

### **Duties of a facilitator**

- Introduce each module
- Answer questions and assist participants while they work
- Provide individual feedback on completed exercises
- Demonstrate or explain certain steps
- Coordinate role plays
- Lead group discussions
- Supervise the field exercise

Slide 7

## **Management of Tuberculosis Facilitator Guide**

Checklist of instructional materials and supplies  
(pages 6–7)

Guidelines for teaching each module:

- procedures table

- notes for each step of the procedures

“Guidelines for all modules” at end of guide

Answer sheets (also in a separate packet for each participant)

Slide 8

## **6. Guidelines for briefing facilitators (2 days)**

### **6.1 Overview of the briefing session**

#### ***Who should attend the briefing session?***

The briefing is intended only for facilitator candidates who:

- have been facilitators in a module-based course (such as IMCI) before, and
- have attended the course *Management of Tuberculosis: Training for Health Facility Staff* as participants.

Candidates who do not meet the above criteria should attend a full-length facilitator training session (described in section 5).

#### ***Who conducts the briefing session?***

Course directors are responsible for conducting the facilitator briefing session.

#### ***What is accomplished during the briefing session?***

During the briefing session, the facilitator candidates will quickly review the modules, which they have previously read and worked through. They will discuss, observe, and practise selected teaching activities described in the *Facilitator Guide*. The focus will be on teaching activities that may be less familiar, such as coordinating role plays, assembling drug boxes, and providing explanations while using an overhead projector.

Since the candidates are familiar with the course and facilitator techniques, they will participate actively in demonstrations and practice from the start of the briefing session. They will share what they have learned from previous teaching experiences. Finally, they will have time to plan with their co-facilitators and arrange their classrooms for the upcoming course.

#### ***When and where should the briefing occur?***

The briefing session requires 2 days. (A suggested schedule is provided on pages 65–66.) The briefing should occur before the course.

It is helpful to brief facilitators in one of the classrooms that will be used by a small group in the actual course. In that way, the group can become accustomed to the facility and surroundings in which they will be teaching.

**6.**

## 6.2 Preparing a schedule for the briefing

A possible schedule for the facilitator briefing begins on the next page. Guidelines follow the schedule. This schedule can be used to make a more precise schedule, including specific dates and times, once you know the times and arrangements for lunch, tea breaks, etc. When adapting this schedule, keep the following points in mind:

- The schedule is 2 working days. Seven working hours have been scheduled each day, and an additional 1–1½ hours have been allowed for lunch and tea breaks.
- Well-prepared facilitators are critical to the success of the course. The 2-day schedule is very full. Do not try to shorten the schedule.
- The schedule assumes familiarity with the course and experience in facilitation. Modules will be reviewed very quickly. Selected, less familiar teaching activities will be emphasized.
- The schedule should be flexible. For example, if facilitators are found to lack certain skills, add more practice of those skills.
- Reserve time for arrangements such as discussion of the schedule for the course, assignment of classrooms, and distribution of instructional materials and supplies.
- Before the end of the briefing, assign pairs of facilitators to work together, and designate classrooms. This will allow the facilitator pairs time to organize their rooms and plan how they will work together.

## Suggested schedule for briefing facilitators

Briefing day 1 (Guidelines follow on pages 68–77)	
Activity	Time
1. Opening session A. Introductions B. Administrative tasks C. Reminder of purpose of the course D. Plans for the course E. Materials needed F. Objectives and schedule for briefing	0.5 hour
2. Review of facilitator techniques and <i>Facilitator Guide</i> A. Roles and responsibilities of a facilitator B. How to use the <i>Facilitator Guide</i> C. Discussion of facilitator techniques based on past experience	1 hour
3. Brief content review of modules A: <i>Introduction</i> and B: <i>Detect Cases of TB</i>	0.5 hour
4. Demonstration and practice of facilitator techniques A. Introducing a module B. Working with a co-facilitator C. Coordinating role plays	1 hour
5. Brief content review of module C: <i>Treat TB Patients</i>	1.5 hours
6. Demonstration and practice of facilitator techniques A. Doing a demonstration (using overhead projector, if possible) B. Individual feedback C. Leading a discussion	1.5 hours
7. Brief content review of modules D: <i>Inform TB Patients</i> and E: <i>Identify and Supervise Community TB Treatment Supporters</i>	1 hour
8. Assignments for the next day – Brief content review of remaining modules of course (F, G, and H) – Review corresponding facilitator guidelines – Prepare for assigned activities	<i>completed as homework</i>

<b>Briefing day 2</b> <i>(Guidelines follow on pages 78–81)</i>	
<b>Activity</b>	<b>Time</b>
1. Module D: <i>Inform TB Patients</i> A. Discussion of module B. Practise coordinating role plays from module D C. Practice of scripted demonstration	1 hour
2. Module E: <i>Identify and Supervise Community TB Treatment Supporters</i> A. Discussion of module B. Practice of coordinating role plays from module E	0.75 hour (45 minutes)
3. Module F: <i>Manage Drugs and Supplies for TB</i> A. Group practical exercise – drug boxes B. Preparations needed for the course	1.5 hours
4. Module G: <i>Ensure Continuation of TB Treatment</i>	0.25 hour (15 minutes)
5. Module H: <i>Monitor TB Case Detection and Treatment</i> A. Discussion of module B. Practice of explaining <i>Summary Worksheet</i> (using overhead projector) C. Practice of explaining time line	1.5 hours
6. Practical arrangements for the course	0.5 hour
7. Closing remarks to facilitators	
8. Planning time for co-facilitators	1.5 hours

### 6.3 Using this guide to conduct the briefing

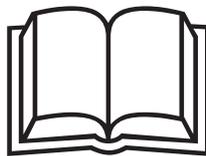
As a course director, you should be familiar with this course and have experience as a facilitator in this course or similar courses. To prepare to brief facilitators, read this guide, and reread and study the *Facilitator Guide*.

When conducting the briefing, keep available the schedule on pages 65–66 for an overview of the steps to be accomplished each day.

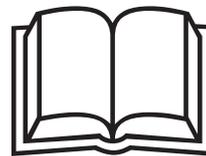
This section gives instructions, day by day and step by step, for conducting the briefing. Just turn to the appropriate part, the appropriate day, and follow the instructions. Some instructions tell you to go to the *Facilitator Guide* and do certain steps described there. When you do that, leave *How to Organize Training for Health Facility Staff on TB Control* open to keep your place. When you have finished the steps in the *Facilitator Guide*, look back to *How to Organize Training for Health Facility Staff on TB Control* to find out what to do next. You will have two guides and a module open at the same time, as shown below:



*How to Organize Training  
for Health Facility Staff  
on TB Control*



*Facilitator Guide*



*Module*

Instructions for the first day of the briefing begin on the next page.

## BRIEFING DAY 1

### 1. Opening session

#### A. *Introductions*

Introduce yourself as the course director and write your name in large letters on a blackboard or flipchart. Ask the facilitator candidates to introduce themselves and write their names under yours on the flipchart. Ask them to share with the group some information about themselves, for example:

- where they are from,
- what is their previous experience with this course, *Management of Tuberculosis: Training for Health Facility Staff*,
- what is their experience with other module-based courses.

#### B. *Administrative tasks*

Make any necessary announcements regarding meals, transportation, payments, hotel arrangements etc.

#### C. *Reminder of purpose of the course*

This training course will eventually be used in many countries. The purpose is to teach the TB case detection and treatment guidelines recommended by WHO. The course is intended for health workers who are responsible for detecting and managing patients with TB. These health workers may include health assistants, medical assistants, nurses, clinical assistants, clinicians, or physicians. Some may be private practitioners.

Health workers may work at health centres, hospital outpatient departments, dispensaries, or health posts. Throughout this course, the term “health facility” is used to include all of these types of health services that deliver outpatient care.

In most health facilities, TB control is integrated with other health services as part of general health care delivery. TB patients are received along with other types of patients. Improving TB management is part of improving health care in general.

The course will teach skills and knowledge specifically needed to detect pulmonary TB cases, manage drug therapy for TB patients, inform patients about TB, and monitor the success of TB case detection and treatment at the health facility level. The course will not teach basic medical techniques that are already familiar to health workers, such as how to give injections or sterilize needles and syringes.

It is expected that participants will return to their health facilities and make changes to improve TB case detection and management.

#### **D. Plans for the course**

Cover the following points:

- There will be (*number*) participants attending the course titled *Management of Tuberculosis: Training for Health Facility Staff*, (*dates*).
- The participants will be health workers who detect and manage TB cases in health facilities.
- All of you (*number*) will be facilitators to assist participants to learn the skills presented in the course materials. These 2 days are your time to prepare.
- As facilitators, you will work in pairs to teach the course. Each pair will be assigned a group of about (*number*) participants. Pairs for the course will be assigned tomorrow.

Give facilitators a copy of the course schedule (based on schedule on page 19).

#### **E. Materials needed**

Give each facilitator the following materials (unless they have brought materials used previously). Comment that participants will be given modules one at a time but that you are giving facilitators the modules all at once so that they may read and work ahead.

- Set of nine modules (A–I) and J: *Reference Booklet*
- *Facilitator Guide*
- Set of overhead transparencies

Answer sheets for the exercises are included in the *Facilitator Guide*. Separate answer sheets will be given to each participant to be collected in a packet.

#### **F. Objectives and schedule for briefing**

During the 2-day briefing facilitators will:

- Review the course content.
- Review expected facilitator behaviours.
- Practise selected teaching techniques that may be less familiar (for example, coordinating role plays, doing demonstrations, or giving explanations using an overhead projector).
- Discuss problems that may arise during the course (for example, slower readers, logistic difficulties, or sections of a module that may be difficult to teach) and prepare to handle these difficulties.
- Have an opportunity to plan with a co-facilitator.

Since all of the facilitator candidates are already familiar with the course and have been facilitators before, the pace of the briefing session will be very rapid. Distribute a schedule for the briefing session based on the suggested schedule given on pages 65–66.

## **2. Review of facilitator techniques and *Facilitator Guide***

### **A. *Roles and responsibilities of a facilitator***

Ask facilitator candidates to quickly read pages 1–5 of the *Facilitator Guide*. Since they have been facilitators in other courses, this information on the duties of facilitators will be a review for them.

Answer any questions about pages 1–5 of the *Facilitator Guide*. Emphasize a few key points that you think are important, for example:

- Do not “lecture”. Let the modules do most of the instruction.
- Be alert for participants who may be confused or having difficulty, and offer individual help as needed.
- Try to relate the exercises and feedback to the participants’ real work responsibilities.

### **B. *How to use the Facilitator Guide***

1. Review the parts of the *Facilitator Guide*:
  - checklists of instructional materials and supplies needed (pages 6–7 of *Facilitator Guide*),
  - procedures table for each module,
  - notes for each step of the procedures, and
  - the section of “Guidelines for All Modules” at the end of the *Facilitator Guide* (pages All-1 through All-8).
2. Point out that answer sheets for the exercises are provided in the *Facilitator Guide*. Copies are also provided in a separate packet for each participant. The facilitator will give answer sheets one at a time to each participant after feedback. Participants may keep their loose answer sheets in a folder or envelope that should be provided with the course supplies.
3. Urge facilitators to follow procedures in the *Facilitator Guide* at all times and make the points specified. They should not adjust the procedures for their own convenience. For example, when the *Facilitator Guide* says to give individual feedback, they should give individual feedback, not turn the exercise into a group discussion. If they feel that an adjustment in the procedures is needed, they should consult with the course director.

### **C. Discussion of facilitator techniques based on past experience**

Since these facilitator candidates have facilitated other courses, they may wish to share their previous experiences (positive and negative) and lessons learned from those experiences. It is important that they have an opportunity to share, but the discussion must ultimately be positive. For example, if someone had a difficult experience facilitating another course, ask, “How can we avoid that problem with this course?”

There are several possible approaches to this discussion. One approach would be to go around the table, one by one, and ask candidates to describe the following:

- their most rewarding experience facilitating,
- their biggest challenge or problem, and how they dealt with it.

Another approach would be to ask candidates to suggest tips, based on their experience, for conducting the following teaching activities:

- individual feedback
- group discussions
- role plays (Note that role plays in this course will be structured differently from those in other courses.)
- working with a co-facilitator.

Draw on the suggestions given on pages All-1 through All-8 of the *Facilitator Guide* as appropriate throughout the discussion. If time allows after the discussion, encourage facilitators to read these pages. If pressed for time, encourage facilitators to read them later.

### **3. Brief content review of modules A: Introduction and B: Detect Cases of TB**

Allow 30 minutes for facilitators to quickly review the contents of these modules. Since they are already familiar with this course, this review is just to refresh their memories. Each module will be reviewed in this manner. One way to quickly review a module is to:

- read the module objectives,
- review the section headings throughout the module and read sections that seem less familiar, and
- try to answer the self-assessment questions at the end of the module.

If one can correctly answer the self-assessment questions, it is likely that one has a clear memory of major points in the module. If not, the answers given in the module indicate the sections to review.

When everyone has had a chance to review the modules, ask whether there are any questions about the module content.

## 4. Demonstration and practice of facilitator techniques

### A. *Introducing a module*

Demonstrate introducing module B as described on page B-2 of the *Facilitator Guide*. This includes an important explanation of the icons and instructions that will guide participants through all of the modules (the **stop sign**, **go back arrow**, etc.).

Ask trainees to notice the instructions for introducing the module as you speak. Tell them that from now on you will ask one of them to introduce each module. Tell them to keep introductions brief (just a few remarks of 1–3 minutes). They should not lecture on the content on the module but should cover the points in the *Facilitator Guide*.

### B. *Working with a co-facilitator*

Explain that there are several ways that co-facilitators can help each other and work together as a team. For example, while one facilitator is leading a discussion, introducing the module, or doing a demonstration, the other facilitator can:

- record information on the flipchart,
- follow along in the *Facilitator Guide* to ensure that no important points are omitted, and
- politely add certain points if necessary.

When first assigned to work together, co-facilitators should take time to talk about previous teaching experiences and individual strengths and weaknesses. They should agree on roles and responsibilities and on how to work together as a team.

Suggestions for working together as co-facilitators:

1. Discuss in advance how to work together on exercises and other activities. Review the teaching activities for the next day, and agree who will prepare for each demonstration, lead each discussion, collect supplies, etc. However, do not divide your work with the attitude that “this is your piece and this is mine”. Be flexible and ready to adjust roles if needed.
2. Work together on each module rather than taking turns at having sole responsibility for a module. During each module, you will at some times be the leader and at other times the helper, writing on the flipchart, etc.
3. After exercises requiring individual feedback, both facilitators should be available to give feedback, so that participants do not have to wait long.
4. When leading a discussion, always try to ask the opinion of your co-facilitator. For example, ask, “Dr King, do you have something to add?” or “Would you agree with this explanation?”
5. When you are assisting, be respectful and polite. Give your co-facilitator your full attention. If you need to add information, wait until a suitable point in the presentation. Then politely ask, “Do you mind if I add something here?” Or say, “Excuse me, there is one more point I would like to mention”.

6. Avoid directly contradicting your co-facilitator in front of the group. If you think that your co-facilitator is doing a demonstration incorrectly or is giving incorrect information, say, “Excuse me, but may I clarify that?” If the situation is more complicated, quickly excuse yourselves, discuss the error privately, and decide how to clarify the explanation or demonstration to the group. The group must be given correct information as soon as possible. A serious disagreement between you and your co-facilitator may require help from the course director.

### **C. Coordinating role plays**

Model how to lead a role play exercise by conducting Exercise A of module B: *Detect Cases of TB*. Following carefully the instructions in the *Facilitator Guide* on pages B-3 and B-4, act as a facilitator, and lead the exercise as if the facilitator candidates were participants in the course.

After the role play exercise and discussion, point out the guidelines that you followed on pages B-3 and B-4 of the *Facilitator Guide* to lead the exercise. Draw attention to the tasks that you did as a coordinator; for example, obtain props, assign roles, etc.

Then ask trainees to look at page All-8 of the *Facilitator Guide* (at the end of the guide in the pages that apply to all modules). Discuss each point on page All-8 and answer any questions. Also review the following points:

- Role plays will not (and should not) be perfectly prepared and rehearsed performances. The point of role plays is to practise accomplishing certain steps in an interaction while communicating effectively.
- The role play exercises are designed so that each participant will have the chance to play the part of the health worker. Participants will be asked to change roles during the exercise.
- The persons first playing the role of the health worker should be encouraged to review the information provided in the module about the role play situation, as well as relevant sections of the module, or the communication skills to be used. The facilitator should be sure that participants understand the purpose of the role play and the steps or points that the health worker should cover.
- The persons playing roles should behave realistically, incorporating any background information given about the role. Players may make up additional information if necessary, as long as it is realistic and consistent with the background information.
- It is important to look ahead in the guide to see when role plays will occur and prepare for them. Some role plays require supplies such as drug boxes or sputum containers. These supplies will be listed in the instructions for the exercise. Explain where these supplies are stored.

Tell trainees that they will have opportunities to practise coordinating role play exercises tomorrow.

## 5. Brief content review of module C: Treat TB Patients

Allow about 1½ hours for facilitators to review the contents of this module. This review is to refresh their memories of the module. Remind facilitators to:

- read the module objectives,
- review the section headings throughout the module and read carefully any sections that seem unfamiliar, and
- try to answer the self-assessment questions at the end of the module.

If one can correctly answer the self-assessment questions, it is likely that one has a clear memory of major points in the module. If not, the answers given in the module indicate the sections to review.

When everyone has had a chance to review this module, ask whether there are any questions about the module content.

## 6. Demonstration and practice of facilitator techniques

### A. *Doing a demonstration (using an overhead projector, if possible)*

Point out that Exercise B of module C: *Treat TB Patients* begins with a demonstration of Case 1 using an overhead projector (if possible). Following the guidelines on page C-4 of the *Facilitator Guide*, lead the group through Case 1.

After the demonstration, explain that:

- A demonstration shows or explains a complex task described in the module. The purpose is to help the participant understand more easily when they read the text or do the related exercise.
- A demonstration may be easier to understand for some participants who have difficulty reading or who are more used to listening to oral presentations than reading.
- The *Facilitator Guide* describes how to do the demonstration. Follow the guide closely; do not explain more than is included in the instructions. It may be confusing if you go beyond the next step that participants will learn in the module.
- Speak clearly and loudly enough. Do not turn your back to participants as you speak. Speak in a conversational tone, varying the pitch and speed of your voice.
- Even if you have seen other facilitators do the demonstration, you need to practise the demonstration before doing it in front of your group during the course. It is especially important to practise with the overhead projector.

Show facilitators how to turn the overhead projector on and off. Explain where it will be stored during the course. There will be opportunities to practise doing additional demonstrations tomorrow.

## **B. Individual feedback**

Experienced facilitators should already be familiar with the technique of individual feedback. However, in some other courses, individual feedback is not consistently given, and some facilitators may think of it as “optional”. Stress that individual feedback will be given in this course whenever it is indicated in the *Facilitator Guide*. Facilitators should not substitute a group discussion.

To show the importance of giving individual feedback, demonstrate using Cases 2–4 of Exercise B of module C: *Treat TB Patients*. Set up two chairs at the front of the room. Ask for a volunteer to act as a “course participant” who has just completed Exercise B. The participant will show you answers written in the module. (For realism, the participant may make up a wrong answer or two.) You (or a very experienced facilitator) should act as the facilitator, modelling the technique of giving **individual feedback**. Sit face to face with the participant at the front of the room and speak clearly so that everyone can “overhear”. Follow the guidelines in the *Facilitator Guide*, page C-4.

After modelling individual feedback, ask facilitator trainees to turn to page All-6 of the *Facilitator Guide*. It explains what facilitators should do when giving individual feedback. Review each point on that list. Then review the additional points below:

- If space allows, provide individual feedback somewhat away from the group, in order to avoid disturbing others and to give the participant some privacy. For example, one facilitator could set up chairs in the hall, while another sets up chairs in the corner of the room. Both facilitators should be available for individual feedback so that participants do not have to wait a long time.
- Individual feedback may be fairly brief. During the course, individual feedback may not be as complete and lengthy as in the preceding demonstration.
- Sometimes the guidelines for feedback on an exercise suggest a question to ask about the participant’s own health facility and its procedures. For example:
  - How do you detect TB cases at your health facility now?
  - What do you do when a TB patient fails to come for treatment?

When these questions are suggested, ask them and listen carefully to the participant’s answers. You will understand the participant’s situation better and may help the participant think through any concerns.

- Some participants may be shy and may read or understand less quickly. Be very patient and do your best to make them feel comfortable.

## **C. Leading a discussion**

Demonstrate (or have a very experienced facilitator demonstrate) how to lead the group discussion in Exercise C (page 77) of module C: *Treat TB Patients*. Be careful to use good facilitator techniques and follow the steps in the *Facilitator Guide*, page C-9.

Point out that Exercise C requires participants to write answers to questions before the discussion. Most discussions in this course require some individual work first, so that participants can organize their thoughts and prepare to share their ideas.

Ask trainees to look at page All-7 of the *Facilitator Guide*. This page gives general guidelines for leading a discussion. Review the points on page All-7.

## 7. Brief content review of modules D: Inform TB Patients and E: Identify and Supervise Community TB Supporters

Allow one hour for facilitators to review module D and module E (including Annexes A and B). Be available to answer questions as they review. Provide separate copies of *A Guide for Tuberculosis Treatment Supporters* if possible. If available, these may be read instead of Annex B of module E.

## 8. Assignments for the next day

Explain that facilitators will finish reviewing the modules tonight and spend more time tomorrow actively practising techniques. Ask them to:

- Review the content of the remaining modules of the course (F, G, and H).
- Review the corresponding facilitator guidelines.
- Prepare for an activity that will be assigned.

Assign the following activities to be practised in front of the group:

### From module D: *Inform TB Patients*

\_\_\_\_\_ Exercise C, role play coordinator, page D-6 of *Facilitator Guide*.

\_\_\_\_\_  
\_\_\_\_\_ Demonstration using script in annex of module, pages D-6 and D-7 of *Facilitator Guide*. (Assign two people.)

### From module E: *Identify and Supervise Community TB Treatment Supporters*

\_\_\_\_\_ Exercise A, role play coordinator, page E-2 of *Facilitator Guide*.

\_\_\_\_\_  
\_\_\_\_\_ Exercise B, role play coordinator, page E-3 and E-4 of *Facilitator Guide* (Note: The coordinator must read Annex A of module E.)

### From module H: *Monitor TB Case Detection and Treatment* (Assign two facilitators to act as co-facilitators or to take turns doing each of the following explanations.)

\_\_\_\_\_  
\_\_\_\_\_ Explanation of *Summary Worksheet* (using overhead transparency), pages H-2 and H-3 of the *Facilitator Guide*.

\_\_\_\_\_  
\_\_\_\_\_ Explanation of time line, page H-6 of *Facilitator Guide*. Provide the overhead transparency of the time line (two parts, pictured on pages H-15 and H-16) to trainees who will do this explanation.

***Notes for course director on preparation for the next day:***

Be ready to distribute a final schedule for the course tomorrow. Be ready to explain how the Field Exercise will be done.

If you have not already done so, decide when and where daily facilitator meetings will be held during the course.

Plan which facilitators will work together as co-facilitators during the course.

Plan which classroom will be used by each pair of facilitators. Ensure that course materials will be available to set up the classrooms tomorrow.

## **BRIEFING DAY 2**

### **1. Module D: Inform TB Patients**

#### **A. Discussion of module**

Ask facilitators whether they had any questions about module D as they reviewed it. Discuss any questions and review the summary of important points.

Note that role play Exercise D (informing patients about HIV and TB) is optional. Decide whether this exercise is needed and suitable for the area in which this course will be given. Make it clear whether you expect facilitators to do this exercise in the course or not.

#### **B. Practice of coordinating role plays from module D**

Ask the assigned role play coordinator to lead Exercise C from module D: *Inform TB Patients*. Make sure that everyone understands that the role play will be repeated three times, with participants changing roles each time, so that each participant has a turn to be the health worker.

After the role plays, provide constructive feedback.

#### **C. Practice of scripted demonstration**

Ask the assigned individuals to perform the scripted demonstration provided in the annex of module D.

Explain that this demonstration is different from the role plays in that it is scripted to include all important points. The script shows how the task of informing patients fits into an initial visit that also includes other tasks, such as opening the *TB Treatment Card*, providing the first dose, etc. During the course, co-facilitators will perform this script as a demonstration.

Answer any questions and provide feedback on the demonstration.

### **2. Module E: Identify and Supervise Community TB Treatment Supporters**

#### **A. Discussion of module**

Ask facilitators whether they had any questions about module E as they reviewed it. Discuss any questions and review the summary of important points.

## **B. Practice of coordinating role plays from module E**

Ask the assigned facilitators to lead role play Exercises A and B. To save time during the facilitator briefing, it is not necessary to change roles and do each role play three times. However, make sure that facilitators understand that during the actual course, every participant should have a turn to be the health worker in each role play.

Provide feedback to the role play coordinators.

## **3. Module F: Manage Drugs and Supplies for TB**

### **A. Group practical exercise – drug boxes**

Lead the group exercise according to the *Facilitator Guide* as though you are a facilitator. Conduct the exercise as you want it done during the actual course.

### **B. Preparations needed for the course**

Explain whether or not facilitators will need to prepare drug boxes for use in their small groups during the course. If so, direct them to work in pairs to prepare the drug boxes following procedures in Annex B. (Note: This task may be done after you have assigned pairs of co-facilitators who will work together in the course.)

Answer any questions that facilitators may have about how to conduct this module during the course.

## **4. Module G: Ensure Continuation of TB Treatment**

Ask facilitators whether they had any questions about module G as they reviewed it. Discuss any questions and review the summary of important points.

## **5. Module H: Monitor TB Case Detection and Treatment**

### **A. Discussion of module**

Since this is a complex module, discuss it in segments. For example, start with section 1 and ask facilitators whether they had any questions as they reviewed it. Discuss any questions and then move on to sections 2, 3, 4, and 5.

### **B. Practice of explaining the Summary Worksheet (using overhead projector)**

Ask the assigned facilitators to explain the *Summary Worksheet*. They may work as co-facilitators or each take a turn at giving the explanation. They should follow the guidelines in the *Facilitator Guide* on pages H-2 and H-3.

If an overhead projector is available, facilitators should use it. If not, they may use an enlarged copy of the *Summary Worksheet*. In either case, review the following points:

- Be sure that all the participants can see the form that you are using. If needed, have the participants move so they can see.
- Be sure to speak clearly and loudly enough. Do not turn your back to participants as you speak.
- Even if you have seen other facilitators do the explanation, you need to practise before doing it in front of your group during the course. Study the guide and then practise what to say so you will not have to read from the guide. If you are using an overhead projector, practise with it.

### **C. Practice of explaining time line**

Ask the assigned facilitators to explain the time line. They may work as co-facilitators or each take a turn at giving the explanation. They should follow the guidelines in the *Facilitator Guide* on page H-6.

After the time line explanation, be sure that everyone knows how to work the two parts of the time line on overhead transparencies and understands the related concepts.

## **6. Practical arrangements for the course**

Explain how the field exercise will work; describe when and where it will occur; and explain about transportation to the health facility (and laboratory, if applicable). When they have time, facilitators should read module I: *Field Exercise* and related guidelines in section I of the *Facilitator Guide*. The field exercise will be discussed in more detail during a facilitator meeting during the course.

Announce assignments of facilitator pairs who will work together during the course. Give facilitators the written schedule for the course.

Inform facilitators that lists of the participants in each group will be prepared on the first morning as soon as participants have registered. Facilitators will be given a copy of the *Course Registration Form* for each participant in their group.

Tell facilitators which classrooms they will use. Tell them when and where they can obtain the course materials for their group, or when the materials will be delivered to their classrooms. Tell them when they can go to their classrooms to:

- arrange the tables, chairs, and materials,
- arrange a place for individual feedback.

If facilitators are expected to assemble drug boxes for their small group and they have not yet done so, remind them and tell them where to obtain the supplies.

Remind facilitators to discuss with their co-facilitators how they will divide the work for the first few sessions.

Tell facilitators whom to contact if they need extra supplies or materials during the course.

Remind facilitators where the overhead projector, and any other shared equipment, will be stored during the course.

Answer any questions about practical arrangements.

## **7. Closing remarks to facilitators**

Tell facilitators when the daily facilitator meetings will be held. Explain the objectives of these brief meetings, which are:

- To assess progress made by each group and identify any problems. To agree on actions to solve each problem.
- To discuss techniques that some facilitators found useful and which can be recommended to others (for example, techniques for leading a group discussion, providing individual feedback, or demonstrating use of a form).
- To prepare for the next day (for example, to review points to be emphasized in modules, prepare for the field exercise, discuss any modifications which may be needed in the schedule).
- To make any necessary administrative announcements.

Tell facilitators that their schedule will be very busy. Encourage *informal* discussions to be held after class hours (for example, to discuss practical applications of course content, potential problems, or other ideas related to the course). Ask facilitators to suggest ways, times, and places that such informal discussions could take place.

If an end-of-course evaluation questionnaire will be used, tell facilitators that they will be given the questionnaire at the end of the course to distribute to participants.

Thank the facilitators for their hard work. Tell them that they will receive certificates along with the course participants at the end of the course.

## **8. Planning time for co-facilitators**

Allow co-facilitators time to discuss plans for the first day of the course and set up their classrooms if possible.



## 7. Directing a full course

### 7.1 Suggestions for opening remarks to participants

As course director, you will want to make some opening remarks to all participants, probably during an opening ceremony. Keep in mind, however, that facilitators will introduce the course in their small groups. Your remarks should therefore be on a general scale, perhaps focusing on the importance of TB control and of the course to health care in the country. You may wish to adapt the following outline:

- Welcome and introductions
- Statement of the need for and importance of the course, and further plans for use of the course
- Key characteristics of the course
  - This course may be rather different from many you have attended in that you will actually *practise* the skills being taught.
  - You will primarily be working in small groups where there will be many opportunities for individual and group discussion.
  - The course will be hard work, but will be equally rewarding in that you will learn or improve skills that you can actually *use on the job* when you return home.
- Announcements about schedule, posting of group assignments, etc.

**7.2****Supervision of facilitators**

Supervise facilitators by observing them with their groups and providing feedback at an appropriate time.

Visit each group in their classroom each day.

- When observing facilitators, refer to the “Performance criteria for facilitators” listed on the next page. Use the appropriate section(s) of the list for the activity that is under way when you visit the group. For example, if they are having a group discussion, refer to the sections titled “Facilitator technique: leading a discussion”. Also refer to the section titled “Facilitator technique: working with a co-facilitator”.

The performance criteria are not intended to be used as a “report card” for the facilitators but as a job aid for your observations and feedback. You do not need to mark on the list for each facilitator; simply keep it in front of you as you make your observations. After your visit to each group, make notes on things that the facilitators were doing well, and things that could be improved. You may give feedback to a facilitator privately, or, if the feedback applies to a number of facilitators, in a daily facilitator meeting. Be careful never to embarrass facilitators by correcting them in front of participants.

On the first day of the course, tactfully but firmly insist on providing individual feedback and commend those who provide it. Be sure that facilitators have set up and are using a comfortable place for individual consultations. If not, help them find a better spot, such as on a terrace near the room or in a hallway, and encourage them to move the necessary chairs there.

Ensure that the facilitators are mentioning all the major points of each module specified in the *Facilitator Guide*.

*When observing facilitators with their groups, refer to this list as a reminder of appropriate facilitator techniques for the activity observed.*

**1. Facilitator technique: working with a co-facilitator**

- a. Shares the work on each module in an organized way (each facilitator has a role in the exercise, discussion, presentation, etc.)
- b. Is flexible and able to adjust role as needed
- c. Is polite and respectful when making comments or suggestions while co-facilitator is leading
- d. When leading, invites co-facilitator to participate by adding comments or an opinion

**2. Facilitator technique: introducing a module**

- a. Keeps introductions brief
- b. Includes all points mentioned in the *Facilitator Guide*

**3. Facilitator technique: individual feedback**

- a. Sits privately with the participant to give feedback
- b. Checks answers carefully; listens as participant discusses reasons for answers
- c. Encourages and reinforces participant's efforts
- d. Helps participant to understand any errors; gives clear explanations
- d. When appropriate, asks questions about the participant's health facility and how the exercise applies to the situation there

**4. Facilitator technique: leading a discussion**

- a. Sets up the discussion by explaining its purpose and how it will proceed
- b. Involves all participants in the discussion
- c. Reinforces participants by thanking them for comments, praising good ideas, etc.
- d. Handles incorrect or irrelevant comments from participants tactfully
- e. Asks questions to keep the discussion active and on track
- f. Responds adequately to unexpected questions; offers to seek answers if not known
- g. Records ideas on the flipchart in a clear, useful manner
- h. Includes points listed in the *Facilitator Guide*
- i. At the end of the discussion, summarizes the major points

**5. Facilitator technique: coordinating role plays**

- a. Sets up role play carefully by obtaining any necessary props
- b. Clearly introduces role play by explaining the purpose, the situation being enacted, background information, and the roles being played
- c. Interrupts only if players are having tremendous difficulty or have strayed from the purpose of the role play
- d. Guides discussion after the role play so that feedback is supportive and includes things done well and things that could be improved

**6. Facilitator technique: while participants are working**

- a. Looks available, interested, and willing to help
- b. Encourages questions
- c. Watches participants as they work; offers individual help to participants who appear confused
- d. Gives individual help quietly, without disturbing others in the group

## 7.4 Conducting daily facilitator meetings

Facilitator meetings are usually conducted for about 30–45 minutes at the end of each day. Facilitators will be tired, so keep the meetings brief.

- Begin the meeting by asking a facilitator from each group to describe progress made, to identify any problems impeding progress, and to identify any skill or any section of the modules that participants found especially difficult to do or understand.
- Identify solutions to any problems related to any particular group's progress or related to difficult skills or sections of the modules.
- Discuss teaching techniques that the facilitators have found to be successful.
- Provide feedback to the facilitators on their performance. Use the notes that you have taken while observing the groups during the day.
  - Mention a few specific actions that were done well (for example, providing participants with individual feedback; making all the major points listed in the *Facilitator Guide*).
  - Mention a few actions that might be done better. (For example, provide more guidance individually instead of in discussions with the whole group; review any major points of the last module before introducing the next module.)
- Remind facilitators of certain actions that you consider important, for example:
  - Discuss problems with a co-facilitator. If co-facilitators cannot solve problems together, go to the course director. The course director may be able to deal with these situations (for example, by setting up tutorials or by discussing matters privately with the individuals).
  - Speak softly when giving feedback to avoid disturbing others. Put chairs in the hall so that a participant and a facilitator can talk without disturbing others in the group.
  - Always be open to questions. Try to answer immediately, but if a question takes too long to answer, or is not relevant at the moment, suggest that the discussion be continued later (for example, during free time, at the tea break). If a question will be answered later in the course, explain this. If unsure of the answer to a question, offer to ask someone else and then come back later with an explanation.
  - Interact informally with participants outside scheduled class meetings.
  - For participants who cannot read the modules and/or do the exercises as quickly as others, the facilitators should:
    - \* avoid doing exercises *for* them,
    - \* reinforce small successes,
    - \* be patient (or ask another facilitator to help).

- Review important points to emphasize in the module(s) the next day.
- Remind the facilitators to consult the *Facilitator Guide* and collect any supplies needed for the next day.
- Make any necessary administrative announcements (for example, location of supplies, room changes, transportation arrangements, etc.).
- After a few days, ask facilitators to point out to you any participants who might be good candidates for facilitator training. These would be participants who:
  - easily understand the modules and the guidelines for TB case management,
  - communicate clearly,
  - help others and work well with others in their group,
  - participate confidently in discussions and role plays.

## **7.5** Collection of data during the course

This guide provides several possible forms for collecting data during the course. These forms are just suggestions. Different forms may be developed for other needs. The forms suggested in this guide are:

- **Course Registration Form** (page 88) – completed by participants at registration on the first morning of the course.
- **Summary Participant List** (page 89) – summary completed by administrative assistant based on registration data.
- **Course Director Summary** (page 90) – completed by the course director at the end of the course based on data collected day by day. Includes information on the total numbers of participants and facilitators, number of participants who completed each module, etc. This information is useful for monitoring numbers of facilitators and participants trained and for ensuring that the course is being given as planned and not altered or shortened unacceptably.

## Course Registration Form

Please print clearly.

Your name:

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Best mailing address:

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Name and address  
of health facility  
where you work:

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What is your current work position or job title?

What are your current duties related to TB case detection and treatment?

What medical or nursing training have you previously received (either in school or in relation to your job)?

What year did you finish your basic medical or nursing training?

## Summary Participant List

Dates of course: \_\_\_\_\_

Location of course: \_\_\_\_\_

Name	Best mailing address	Name and location of health facility	Current position or job title

## Course Director Summary

### Management of Tuberculosis: Training for Health Facility Staff

**Dates and location of course:** \_\_\_\_\_

**Facilitator training or briefing (if applicable):**

Dates of facilitator training or briefing: \_\_\_/\_\_\_/\_\_\_ – \_\_\_/\_\_\_/\_\_\_  
 Number of facilitators trained or briefed: \_\_\_\_\_\*

**Course:**

Dates of course: \_\_\_/\_\_\_/\_\_\_ – \_\_\_/\_\_\_/\_\_\_  
 Number of full days: \_\_\_\_\_  
 Total number of hours worked in course: \_\_\_\_\_  
 Number of participants: \_\_\_\_\_

Modules completed	Tick (✓) if all participants completed:	If not all, indicate number who completed:
A: Introduction		
B: Detect Cases of TB		
C: Treat TB Patients		
D: Inform Patients about TB		
E: Identify and Supervise Community TB Treatment Supporters		
F: Manage Drugs and Supplies for TB		
G: Ensure Continuation of TB Treatment		
H: Monitor TB Case Detection and Treatment		

**Field Exercise:** Was the field exercise done? If not, why not?

**\*Number of facilitators serving at course:** \_\_\_\_\_ If different from the number trained above, please explain:

**Ratio of facilitators to participants:** 1 to \_\_\_\_\_

**Course director's comments and observations** (On the reverse side, please comment on administrative issues, problems and how you solved them, constructive suggestions for future courses, etc.)

## 7.6 End-of-course evaluation

You may wish to use an evaluation questionnaire to determine participants' **opinions** at the conclusion of the course. A Sample Evaluation Questionnaire appears on pages 92–94. Review and revise this questionnaire as necessary to ensure that it is appropriate for evaluating the course as it has been conducted.

Note that there are some blank spaces in the left column of the tables in the questionnaire. Add any other activity you wish to evaluate (for example, a plenary on a particular subject) in one of these spaces before you make duplicate copies for the participants.

You may wish to add or delete specific questions. If you make such revisions, remember:

- keep the questionnaire as short as possible, and
- only include questions if you will use the responses for a specific purpose, for example, to plan future courses or to evaluate the helpfulness of a particular activity.

Note that the questionnaire on the following pages will provide only a summary of participants' opinions and feelings about the course. It will **not** evaluate the skills and knowledge learned by participants. Facilitators evaluate how well participants learn the skills and knowledge on an ongoing qualitative basis throughout the course, as they assess participants' work on written exercises, in role plays, and in group discussions. If a course director wishes to evaluate skills and knowledge learned at the end of the course in a quantified way, another evaluation instrument will need to be developed. One possibility is to compile the self-assessment questions from the end of each module and use them as a final "test" to be taken by each participant.

## Sample Evaluation Questionnaire

### Management of Tuberculosis: Training for Health Facility Staff

1. Do you have responsibility for detecting and managing TB in your job?  
 (Tick ✓)  Yes  No

What is your position?

In what type of health facility do you work? (Tick ✓)

Health centre  Hospital  Other, please describe: \_\_\_\_\_

2. For each module or booklet listed in the left column, tick (✓) the box which you think best describes it.

Module or booklet	Very useful	Useful	Somewhat useful	Useless
A: Introduction				
B: Detect Cases of TB				
C: Treat TB Patients				
D: Inform Patients about TB				
E: Identify and Supervise Community TB Treatment Supporters				
F: Manage Drugs and Supplies for TB				
G: Ensure Continuation of TB Treatment				
H: Monitor TB Case Detection and Treatment				
I: Field Exercise (health facility visit)				
J: Reference Booklet				

3. Which module was most difficult for you? Why?

4. What was good about the course?

5. What was not good about the course?

6. Are there any skills for detecting and managing TB that you think should be added to the course? What are they?

7. For each activity listed below, tick one box to indicate whether you thought the time spent on that activity was *too short*, *adequate* or *too long*.

Type of Activity	Time Spent Was:		
	Too Short	Adequate	Too Long
Written exercises followed by individual discussions of your work with a facilitator			
Role plays			
Group discussions			
Self-assessment questions			
Entire course			

8. Based on what you have learned in this course, what will you try to change or improve in your health facility?

9. Please list any other comments or suggestions for improvement of the course.

**7.7****Closing session**

Review highlights of the course. You may include any important points that have been raised during the course.

Explain that participants should try to begin using the practices taught in this course when they return to their health facilities. If they encounter difficulties, they should seek help. Describe any help that may be available in the form of consultation, e-mail contacts, etc.

Present course photographs and certificates to the participants and facilitators and congratulate them on their hard work.



## 8. Implementing other options for using the course materials

### 8.1 Conducting a partial course (selected modules)

In some situations, it may be appropriate to teach a partial course using only selected modules. The national TB control programme will decide whether a partial course is appropriate and which modules to use. Partial courses should always include module A: *Introduction*.

A partial course may be useful for solving specific problems caused by a lack of skill or knowledge, introducing a new aspect of the programme, providing refresher training on critical tasks, etc. Some examples of circumstances warranting a partial course are as follows.

#### **Examples**

- Health facilities are correctly detecting and managing cases of TB, but many patients are defaulting. A partial course to solve this problem might include module G: *Ensure Continuation of TB Treatment* and module H: *Monitor TB Case Detection and Treatment*. Module G would teach participants ways to prevent defaults, and module H would teach them how to monitor whether their efforts are successful.
- Two years ago, a region conducted a course that included all of the modules except E: *Identify and Supervise Community TB Treatment Supporters*. At that time, there were no plans to use community TB treatment supporters in the region. Now, the programme is ready to introduce community TB treatment supporters. A partial course could be conducted using module E: *Identify and Supervise Community TB Treatment Supporters* and any other modules that need review.
- Health workers are correctly detecting and managing cases of TB, but they have not been taught how to communicate with patients to inform them about TB. A partial course to address this issue could include module D: *Inform Patients about TB*.

When doing a partial course including only a few modules, it may be possible to go into more depth on a subject, for example, have additional group discussions, or use the additional optional role plays in module D: *Inform Patients about TB*.

#### **Preparing facilitators for a partial course**

Even if only a partial course is given, it is important to have trained facilitators. If possible, select facilitators who have already been trained to conduct the full course; these fully trained facilitators will be prepared to conduct the selected modules as well as answer questions related to other course content.

If you must prepare new facilitators to conduct a partial course, be sure that every facilitator has a *Facilitator Guide*. Work through the selected modules with them, serving as their facilitator and following the guidelines in the *Facilitator Guide*. Depending on the types of exercises in the selected modules (for example, written exercises with individual feedback or

role plays), identify the relevant facilitator techniques from the list in the following table. Teach these techniques by adapting guidelines and information on the listed pages of this guide and the *Facilitator Guide*. Also have the new facilitators practise the techniques using the exercises in the modules.

Facilitator technique:	Guidelines and information are on the following pages in...	
	this guide:	<i>Facilitator Guide</i> :
Working with a co-facilitator	34–35	All-4
Coordinating role plays	36–37	All-8
Individual feedback	37-38	All-6
Conducting a demonstration (using overhead projector)	41	–
Leading a discussion	42	All-7
While participants are working	42	All-5

For example, module D: *Inform Patients about TB* requires facilitators to provide individual feedback on written exercises, coordinate role plays, and lead group discussions. To prepare to teach module D, facilitators must learn about all these three techniques and practise them.

## 8.2 Providing on-the-job training

On-the-job training is conducted in the workplace using real examples and carefully supervised practice with real patients. There may be just one trainee or several. Trainees may read the information in the modules and then do adapted exercises with real health facility forms and patients, under careful supervision. On-the-job training may be used for reinforcement or retraining when a problem is identified, or to orient new staff until they can attend a full course.

Some examples of situations in which on-the-job training is suitable include the following:

- The District TB Coordinator does a few hours of specific training when visiting each health facility in the district.
- A supervisor notices a problem that is due to health workers' lacking certain skills or information. The supervisor wants to correct this problem quickly through on-the-job training.
- A trained TB nurse is moving to a new job and can orient and train the new nurse before leaving.

On-the-job training, like all good training, should include information, examples, and practice. Practice, followed by feedback, is the most critical element of training. In a workplace setting, the following methods may be used to provide information, examples, and practice.

To provide:	Possible training methods include:
<b>Information</b>	<p>Reading relevant sections of the modules</p> <p>Studying "job-aids" (like those in J: <i>Reference Booklet</i>)</p> <p>Listening to an experienced, trained health worker explain procedures</p>
<b>Examples</b>	<p>"Shadowing" and observing an experienced, trained health worker who is performing TB-related tasks</p> <p>Reviewing forms from the health facility, such as the <i>Register of TB Suspects</i> and <i>TB Treatment Cards</i></p> <p>Examining TB drug boxes or drug supplies used at a health facility</p>
<b>Practice</b>	<p>Doing written exercises adapted from the modules with real patient data and real <i>TB Treatment Cards</i></p> <p>Doing role plays adapted from the modules with real patients, while a supervisor or trainer observes and gives feedback</p> <p>Doing the actual work of the health facility (detecting cases, collecting sputum, giving directly observed treatment, recording information) with real patients, while a supervisor or trainer observes and gives feedback</p>

If supervisors or District TB Coordinators are expected to provide on-the-job training, they should receive some guidance in “how to train”. It is best if they attend the course, *Management of Tuberculosis: Training for Health Facility Staff* and are also trained as facilitators. They will then be familiar with the course and better able to adapt segments for use in on-the-job training.

On-the-job training may focus on an entire module or on just a part of a module. Examples of on-the-job training are provided on the following pages. Example 1 is a plan that a District TB Supervisor might use to review all of module B: *Detect Cases of TB* with previously trained staff, or to train new staff. Examples 2 and 3 describe focused on-the-job training in specific tasks taught in module C: *Treat TB Patients* and module D: *Inform Patients about TB*.

## **Example 1**

### **On-the-job training using module B: *Detect Cases of TB***

#### **Information**

Have the trainee(s) read or review pages 1–9 of the module. Discuss how and when TB suspects are identified in the health facility, specifically:

- what questions to ask,
- whom to ask,
- who should ask the questions, and
- who needs a sputum examination.

#### **Examples**

Show and discuss the forms actually used in the health facility for detecting cases of TB (the *Register of TB Suspects* and *Request for Sputum Examination*), and show how to complete them.

Demonstrate the steps in sputum collection (on page 25 of the module).

#### **Practice**

Adapt Exercise A (role play of collecting sputum and completing forms) so that it is supervised practice; that is, the trainee performs the steps with a real TB suspect. The trainee explains to the patient what is needed, writes in the actual *Register of TB Suspects*, completes an actual *Request for Sputum Examination*, and packs the sample for shipping (or refrigeration before shipping) according to the usual procedures at the health facility. During the practice, give suggestions as needed to ensure that the trainee performs the tasks correctly.

#### **Information**

Have the trainee(s) read or review pages 10–19 of the module.

#### **Example**

Look at the real *Register of TB Suspects* used in the health facility. Examine how entries are made when results are received from the laboratory (such as date results received, results, and actions taken).

#### **Practice**

Ask the trainee to do Exercise B from the module and/or practise reading and recording real results from the laboratory on the real *Register of TB Suspects*. Ask the trainee to tell what should be done for each suspect based on the results: treatment of TB, referral for assessment, treatment of respiratory illness, no treatment, etc. Discuss as needed.

Ask the trainee to answer the self-assessment questions at the end of the module and check the answers (pages 19–21 of the module). Discuss as needed.

## **Example 2**

A supervisor in a large health facility has noticed that health workers are putting all patients with smear-positive sputum examination results on Category I treatment. It appears that health workers do not know to ask whether patients have been treated for TB before, or what to do for previously treated patients. The supervisor decides to provide quick on-the-job training to solve this problem.

### **On-the-job training to solve a problem**

#### **Information**

Explain carefully the information on pages 3–6 of module C: *Treat TB Patients*. These pages describe how to determine the disease site, the type of patient, and the treatment category. Emphasize the questions to ask about previous treatment:

- Have you ever been treated for tuberculosis?
- Have you ever taken injections for more than 1 or 2 weeks? Why?
- Have you ever taken a medicine that turned your urine orange/red?

Explain the importance of these questions. Post the questions on the wall along with Figure 1: Definitions of type of patient, and Figure 2: Selecting a treatment category.

#### **Example**

Describe a sputum smear-positive patient who has been treated for TB before. As you identify the type of patient, point to the appropriate definition on Figure 1. As you describe the decision process about the patient's treatment category, point to Figure 2.

If possible, allow health workers to observe an initial interview with a patient. Be sure to ask all of the above questions about previous treatment. After the patient has left, review the type of patient and treatment category selected.

#### **Practice**

Do Exercise A from the module (selecting a treatment category). Focus especially on Cases 2 and 4 (previously treated cases).

When patients come to hear the results of sputum examinations, observe as health workers interview the patients. (These observations may occur sporadically over several days.) Ensure that health workers ask the questions about previous treatment and select the appropriate treatment category. Give feedback.

### **Example 3**

A trained, experienced TB nurse will soon be leaving for a new job. Before leaving, she is training the new TB nurse on the job. The new nurse “shadows” the experienced nurse and learns much by observing and asking questions. The experienced nurse devotes special attention to teaching the new nurse the more complex tasks, such as informing the patient about TB (the initial meeting with the patient).

#### **On-the-job training of a new staff member in a specific task**

##### **Information**

Explain the information on pages 3 and 7–10 of module D: *Inform Patients about TB*. Provide a copy of these pages (or the entire module) for the nurse to read. Post the *Guide for initial patient information about TB* (pages 9–10) on the wall.

##### **Example**

Allow the new nurse to observe an initial meeting to inform a patient about TB. Be sure to ask questions about the patient’s current knowledge of TB and follow the *Guide for initial patient information about TB*.

##### **Practice**

Enact the role play in Exercise C. Play the role of Mr Salas (the patient) while the new nurse acts as the health worker informing the patient about TB.

Have the new nurse conduct meetings with real patients under your supervision. Assist as needed and provide feedback afterwards.

These are just a few examples of how the course materials could be used in on-the-job training. An experienced and creative facilitator, trainer, or supervisor who is familiar with the course could use the materials in many different ways as part of on-the-job training.

**8.3****Providing materials for self-teaching**

Self-teaching involves reading and working through the modules independently to learn the concepts and skills by oneself. Learners must have the sustained ability to read, write, and concentrate, as well as motivation to complete the materials. Some exercises (such as role plays and group discussion) will not be possible. Independent learners should be given a set of answer sheets to check their own answers to written exercises.

Examples of situations in which self-teaching may be suitable include the following:

- Some time after attending a course, participants may be encouraged to work through a module again for review.
- A District TB Coordinator may visit a health facility and find a new staff member who has not been trained. The next full course is scheduled in six months. The new staff member (and supervisor) may be given the course materials to work through until the staff member can attend the course.
- A nongovernmental organization requests that their health staff in the area be provided with the course materials to help ensure that TB services are consistent with those provided at ministry of health facilities.

The course materials should not be sent to health workers via mass mailings. The materials should be provided to specific individuals who need them and are interested in using them, along with their supervisors. Motivated, capable health workers may learn well independently if supported by a supervisor who can answer questions and ensure completion of the modules.