

# Management of Tuberculosis Training for District TB Coordinators

## How to Organize Training for District TB Coordinators



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This guide accompanies training material that was prepared based on the WHO document: Treatment of tuberculosis: guidelines for national programmes, 3rd ed. 2003 (WHO/CDS/TB/2003.313) for use in tuberculosis control programmes where WHO recommendations or compatible national recommendations are implemented.

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Training for District TB Coordinators**

**HOW TO ORGANIZE TRAINING FOR  
DISTRICT TB COORDINATORS**

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### *Management of Tuberculosis Training for District TB Coordinators*

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

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# How to Organize Training for District TB Coordinators

## 1. Introduction

### 1.1 Target population for this guide

This guide, *How to Organize Training for District TB Coordinators*, is for **national or provincial level staff responsible for training** District TB Coordinators. This guide explains options for using the course *Management of Tuberculosis: Training for District TB Coordinators*. 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 the training course 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 Role of the District TB Coordinator

While the work of detecting and treating TB cases occurs at the health facility level, the District TB Coordinator is responsible for many activities that allow the health facilities to do their work, for example, supplying anti-TB drugs, training health workers, and ensuring laboratory support.

The District TB Coordinator is responsible for planning, organizing, implementing, and evaluating activities of a district TB control programme. TB control may be the individual's primary responsibility, or TB may be just one of several disease areas of responsibility.

A district usually serves a population of 100 000 or more. Depending on the size of the district and the number of staff available, the District TB Coordinator may be one person or a team of people. If a district is large, one full-time person solely responsible for TB control, or a team approach, may be justified. In a small district, it may be a part-time responsibility to coordinate the TB control programme. In the WHO training course, the person (or team) responsible for TB control at the district level is called the District TB Coordinator.

The District TB Coordinator is usually a physician or a nurse. He or she works at the district health office and may also have clinical duties at the hospital. The job of District TB Coordinator is primarily administrative and managerial. Although the District TB Coordinator must be thoroughly familiar with clinical guidelines of the national TB control programme, he or she is primarily responsible for enabling and monitoring the implementation of these guidelines, rather than actually treating patients.

The District TB Coordinator usually reports to the District Medical Officer (DMO) and is supervised by the Provincial TB Coordinator. The District TB Coordinator has no direct supervisory authority over health facility staff, but is responsible for overseeing their performance of tasks related to TB case detection and treatment. For example, the District TB Coordinator visits health facilities to observe performance, record cases in a *District TB Register*, make suggestions, solve problems, and provide training and support.

Health facilities providing TB control services in a district may include public or non-public health centres, hospitals, dispensaries, or health posts. Throughout the course materials, the term “health facility” is used to include all types of health services that deliver outpatient care. In most countries TB control is part of general health-care delivery, and TB patients are received along with other types of patients. Improving TB case management is part of improving health care in general.

### 1.3 Purpose of the training course

WHO designed the training course to teach to District TB Coordinators the skills and knowledge needed to plan, supervise, implement, monitor and evaluate activities of a district TB control programme. Specific learning objectives of the course are listed on pages 4–6 of this guide.

The course does **not** teach clinical skills and knowledge needed to detect and treat cases of pulmonary TB at the health facility level. Those skills and knowledge are taught in another course, titled *Management of Tuberculosis: Training for Health Facility Staff* (WHO/CDS/TB/2003.314), available through the WHO. The course for District TB Coordinators is designed to be entirely consistent with the course for health facility staff. In fact, District TB Coordinators may use *Management of Tuberculosis: Training for Health Facility Staff* as a resource for providing training in their districts. (See module *D: Provide Training for TB Control* of the course *Management of Tuberculosis: Training for District TB Coordinators*.)

Neither course teaches 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 WHO treatment guidelines and other appropriate references.<sup>1</sup>

It is expected that participants in the district-level course will implement the managerial, supervisory, and administrative procedures taught. In order to implement these procedures, District TB Coordinators will need:

- a thorough understanding of the national TB control guidelines,
- microscopy support for examining sputum samples for TB,

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

Crofton J, Horne N, Miller F. *Clinical tuberculosis*, 2nd ed. London, Macmillan Education Unlimited, 1999.

Frieden T, ed. *Toman's tuberculosis. Case detection, treatment, and monitoring: questions and answers*, 2<sup>nd</sup> ed. Geneva, World Health Organization, 2004. (WHO/HTM/TB/2004.334)

*Treatment of tuberculosis. Guidelines for National Programmes*, 3<sup>rd</sup> ed. Geneva, World Health Organization, 2003. (WHO/CDS/TB/2003.313)



- training support from the provincial level,
- a reliable source of anti-TB drugs and related supplies,
- standard TB forms such as the *District TB Register* and *Quarterly Reports* as required by the national TB control programme,
- resources for transportation (e.g. time, vehicle, fuel, per diem) to conduct supervisory visits to health facilities in the district.

TB treatment regimens vary from country to country. Each district should, of course, implement the standard regimens recommended in the national guidelines. The general managerial principles and practices taught in this course are applicable anywhere.

## 1.4 Course methods and materials

The course uses a variety of methods and instruction, including reading, written exercises, discussions, demonstrations, and observations in a real health facility. Practice, whether in written exercises or discussion, is considered a critical element of instruction. Many of the exercises in the course are related to an imaginary district, called Faba District, for which participants will make decisions as though they were the District TB Coordinator.

The complete training course includes the modules (booklets) listed below. Modules C–J are instructional units that contain exercises; the other modules contain support materials such as a glossary, background information needed for exercises, and answer sheets.

**A: Introduction** (*includes a glossary with definitions of terms*)

**B: Faba District**

**C: Conduct Supervisory Visits for TB Control**

**D: Provide Training for TB Control**

**E: Manage Drugs and Supplies for TB Control**

**F: Ensure Laboratory Support for TB Control**

**G: Monitor and Evaluate TB Control**

**H: Advocacy and Collaboration for TB Control**

**I: Develop the District Plan of Action for TB Control**

**J: Field Exercise – Supervisory Visit**

**K: District Tuberculosis Register**

**L: Tuberculosis Laboratory Register**

**M: Answer Sheets**

The course is designed for small groups of participants who 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, etc. For the most part, participants work at their own pace through the modules, although in some activities the small group works together.

The modules may be used in several different ways:

- All of the modules may be completed in sequence without interruption, for example, in a 5-day training session.
- Selected modules may be used in a series of short training sessions, for example, one or two modules per month.
- Selected modules may be used in a training session to teach specific needed skills.
- Motivated individuals may work through modules on their own to teach themselves.
- Modules may be used as a reference.

## 1.5 Learning objectives

Each module provides information, examples, and opportunities to practise certain skills needed by a District TB Coordinator. Exercises are provided at the end of each module. Instructional modules C–J will prepare District TB Coordinators to do the following tasks:

### **C: Conduct Supervisory Visits for TB Control**

- Make a schedule for supervisory visits to health facilities
- Maintain the *District TB Register*: register patients who were detected recently at the health facility; at later supervisory visits, record their follow-up sputum examination results and finally their treatment outcomes
- Determine whether smear-positive patients are converting by the end of the initial phase, and try to solve any problems with treatment
- Review the *Register of TB Suspects* to identify any problems with case detection
- Assess performance of TB case detection and treatment to identify problems; analyse causes and possible solutions
- Promote the DOTS strategy and the TB control programme at health facilities
- Identify training needs of health workers responsible for TB case detection and treatment
- Write a brief report of a supervisory visit

### **D: Provide Training for TB Control**

- Recognize good training
- Provide training for facility staff to prepare them to identify TB suspects
- Resolve problems due to lack of skill and knowledge through training

### **E: Manage Drugs and Supplies for TB Control**

- Calculate the quantity of anti-TB drugs to order for the district for a quarter
- Calculate the quantity of sputum containers to order for the district for a quarter
- Calculate quantities of anti-TB drugs to distribute to each health facility for a quarter
- Calculate quantities of forms and registers needed for a year

## **F: Ensure Laboratory Support for TB Control**

- Assess health facilities' access to a TB microscopy unit
- Assess the TB microscopy workload and how it is distributed in the district
- Determine whether there is a need to increase the capacity of the TB laboratory services
- Review the *Tuberculosis Laboratory Register* and verify that all smear-positive cases are registered accurately in the *District TB Register*
- Review the *Tuberculosis Laboratory Register* to identify problems
- Check briefly whether microscopists keep slides for quality assurance, and have sufficient equipment, supplies and training

## **G: Monitor and Evaluate TB Control**

- Monitor implementation of the *District Plan of Action for TB Control*
- Complete the *Quarterly Report on TB Case Registration*
- Complete the *Quarterly Report on Sputum Conversion*
- Complete the *Quarterly Report on Treatment Outcomes*
- Understand and apply principles of cohort analysis
- Calculate and analyse five recommended district-level indicators
- Identify causes and solutions of problems identified through monitoring
- Evaluate achievement of annual targets for sputum conversion and expansion of TB control services

## **H: Advocacy and Collaboration for TB Control**

- Promote the DOTS strategy to non-public health facilities, and collaborate with them in TB control efforts
- Promote the DOTS strategy to private physicians, physicians' associations, and medical and nursing associations
- Promote the DOTS strategy and TB control services to community leaders
- Collaborate with the HIV programme

## **I: Develop the District Plan of Action for TB Control**

- Assess the extent and quality of current TB control services
- Plan to maintain and improve current TB control services
- Set a sputum conversion target for the coming year
- Determine whether to expand TB control services to more health facilities in the district
- Set a target for expanding TB control services in the district
- Specify activities in a *District TB Plan*

## **J: Field Exercise – Supervisory Visit**

- Complete the *Checklist for Supervisory Visits* while visiting a real health facility
- Complete the chart, *Training Needs for TB Control*, for this health facility
- Analyse a performance problem observed at the health facility

The order of modules in the course was been carefully planned. You may wonder why module I, which teaches how to develop a *District TB Plan*, is presented towards the end of the course. One reason is that it is helpful to learn about the different activities described in earlier modules (supervision, training, managing drugs and supplies, etc.) before being asked to describe them in a plan. Another reason is that monitoring and evaluation provide the basis for a good plan; therefore, the module on monitoring and evaluation needs to precede the module on planning. An example of a *District TB Plan* is also presented early in the course, in module B: *Faba District*.

## 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 person or persons who perform the duties of a District TB Coordinator 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 or provincial 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 a new District TB Coordinator until it is possible to attend a full course.

- **Self-teaching**

Motivated District TB Coordinators may work through modules on their own for reinforcement or retraining. New District TB Coordinators may work through modules on their own until they can attend a full course.

- **Reference**

Modules may be used as a reference for staff in a district health office.

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. National or provincial staff who are responsible for training District TB Coordinators 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.  Course must be scheduled at a time when District TB Coordinators do not have reporting or procurement deadlines.
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 of a District TB Coordinator fit together. Some skills may be harder to learn without doing the previous modules.
On-the-job training	Convenient for participants and districts. Not necessary to travel far 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 are likely to be omitted. Requires skilled supervisor or mobile instructor to fit the modules into the work schedule, adapt exercises to the real work setting, 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 learners can be reached simultaneously. Motivated, capable District TB Coordinators 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 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 District TB Coordinators* 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 20–21.

#### 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 supervisory visit to a health facility) and/or a visit to a TB microscopy unit, suitable facilities must be accessible in the area. (See pages 18–19 for a description of the field exercise.)
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 23, 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 21 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.

3.

6. \_\_\_\_ Letters sent to the appropriate office asking that office to identify District TB Coordinators for training. Letter:
- a. \_\_\_\_ announces the course, *Management of Tuberculosis: Training for District TB Coordinators*, and explains the purpose of the course.
  - b. \_\_\_\_ clearly states the number of participants to attend the course, and that these should be individuals who have responsibility for planning, organizing, implementing and evaluating the activities of a district TB control programme.
  - 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 section 3.2, Criteria for selecting facilitators, page 15.) 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 to be visited.) Selection based on availability of:
- a. \_\_\_\_ adequate lodging (if needed) for all facilitators and participants
  - b. \_\_\_\_ accessibility to health facilities to 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 stand with paper for each of these rooms
  - g. \_\_\_\_ separate room for secretariat.
9. \_\_\_\_ List compiled of District TB Coordinators 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 16–17 of this guide. )
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 section 5.2 Preparing a schedule for full facilitator training, pages 27–30; section 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. \_\_\_\_ Health facilities confirmed to be suitable for visiting. Supervisor and staff at each health facility informed about visit. (See pages 18–19 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 copies made for each facilitator and participant. (See section 3.6, Suggested schedule for the course, page 21.)
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, skills and knowledge related to TB case detection and treatment, supervisory/management skills, 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 16–17 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.
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 printed 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 planning, organizing, implementing and evaluating activities of a district TB control programme. They should possess managerial, supervisory and administrative skills, applied to TB control.** They should be accustomed to using a *District TB Register*. They must have the **basic clinical skills and technical knowledge** that will allow them to explain the TB guidelines for case detection and treatment that should be implemented in health facilities.
- 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, 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 *Management of Tuberculosis: Training for Health Facility Staff*, 2004) 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.

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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.

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 management of a district TB control programme
- communicate clearly
- help others and work well with others in their group
- participate confidently in discussions

### 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
N: <i>Facilitator Guide</i>	1 for each facilitator
Set of twelve modules (A–L)	1 set for each facilitator and 1 set for each participant
M: <i>Answer sheets</i>	1 for each participant
Set of overhead transparencies made by copying pages All-11 through All-18 in N: <i>Facilitator Guide</i> .	1 set for each facilitator
Copy of course schedule	1 for each facilitator and participant

### **3.4** List of other supplies needed

#### ***Supplies needed for each person***

- name tag and/or name card for table
- 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 (helpful to mark place in the module while doing an exercise)
- pencil sharpener
- stapler and staples
- 1 roll masking tape
- extra pencils and erasers
- flipchart pad and markers, or blackboard and chalk
- overhead projector, supplies for making overhead transparencies, and erasable markers for writing on overhead transparencies

### 3.5 Preparing for the field exercise

This course includes a field exercise in which participants visit a health facility that provides TB control services. J: *Field Exercise–Supervisory Visit* describes how to conduct this visit and provides three items to be completed (to some extent) by participants during the visit:

- *Checklist for Supervisory Visits to Health Facilities Providing TB Control Services*
- *District TB Register*
- *Training Needs for TB Control*

Only conduct the field exercise if it can be done well and at a suitable facility. Read module J: *Field Exercise – Supervisory Visit* and the applicable facilitator guidelines (pages J-1 – J-6 in N: *Facilitator Guide*) to learn what participants should do during the visit.

#### **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. Mention that participants would like to see some *TB Treatment Cards* and the *Register of TB Suspects*. Also mention that participants would like to watch how TB cases are managed, for example, how the health worker and TB patient interact when the patient comes for TB treatment.

<u>Section</u>	<u>Information sources needed to complete sections of the checklist</u>
A, B	<i>TB Treatment Cards</i> (3–4 per participant)
C, J	<i>Register of TB Suspects</i> (or <i>Tuberculosis Laboratory Register</i> ); monitoring results; health worker responsible for monitoring at the health facility
D, K	Storage areas for supplies of anti-TB drugs; health workers who do TB case detection and treatment; access to areas where patients wait and are treated; access to microscopy unit (if there is one)
E, I	The health facility supervisor, head nurse or health worker responsible for TB control services (who can provide the names of health workers who do TB case detection and treatment and information about their training); community TB treatment supporters, if available



F,G,H Health worker(s) who do TB case detection and treatment; area where outpatients are seen; interaction of TB patient with health worker while providing directly observed treatment; TB patients who have come for treatment (they will be interviewed after they have received the treatment)

Explain that participants will not all observe the same aspect of TB control services 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 treatment 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 1.5 hours at the health facility. In addition, allow time for transport to and from the health facility.

### ***Optional visit to a TB microscopy unit***

A visit to a TB microscopy unit may be included in the field exercise if it will be useful and feasible. Determine whether there is a TB microscopy unit 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. If the visit to a TB microscopy unit 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 about 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. If some participants get very far ahead while working at home, they may be bored in class the next day. Also, it is best if facilitators are present while participants are working in order to answer questions.

## Schedule for the course

	<b>Activity</b>	<b>Time</b>
<b>Day 1</b>	Registration and opening presentation	0.5 hour
	Module A: <i>Introduction</i>	1.5 hours
	Module B: <i>Faba District</i>	
	Module C: <i>Conduct Supervisory Visits for TB Control</i>	5 hours
<b>Day 2</b>	Module D: <i>Provide Training for TB Control</i>	3 hours
	Module E: <i>Manage Drugs and Supplies for TB Control</i>	3.5 hours
	Prepare for field exercise	0.5 hour
<b>Day 3</b>	Module F: <i>Ensure Laboratory Support for TB Control</i>	4 hours
	Module J: <i>Field Exercise – Supervisory Visit*</i>	3 hours
<b>Day 4</b>	Module G: <i>Monitor and Evaluate TB Control</i>	7 hours
	Discussion of field exercise	0.5 hour
<b>Day 5</b>	Module H: <i>Advocacy and Collaboration for TB Control</i>	2.5 hours
	Module I: <i>Develop the District Plan of Action for TB Control</i>	4 hours
	Closing session	0.5 hour

\* Timing of the field exercise may depend upon local circumstances, the locations and hours of health facilities to be visited, etc.



## 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: Training for District TB Coordinators* 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 *Management of Tuberculosis: Training for Health Facility Staff* (2004), or *Integrated Management of Childhood Illness* (IMCI), they may already be familiar with most of the facilitator techniques used in the course *Training for District TB Coordinators*. They may simply need to review these techniques.

However, if the facilitator candidates have not 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, 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 another module-based course, such as IMCI or <i>Management of TB: Training for Health Facility Staff</i>	Have taken the course for District TB Coordinators as participants	Use the <b>briefing agenda</b> (section 6)	Review of course content Review of selected facilitator techniques
	Have <b>NOT</b> taken the course for District TB Coordinators 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.

4.



## 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 *Management of Tuberculosis: Training for Health Facility Staff* or IMCI) before, **or**
- have not attended the course 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

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 28–30.) 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.

5.

### ***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, 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, or lead a group discussion. 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 during 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 the times and arrangements for lunch, tea breaks, etc. are known. 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 21) 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 32–42)</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>	0.5 hour
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>Faba District</i> A. Facilitator technique: introducing a module B. Reading the module	0.5 hour
5. Module C: <i>Conduct Supervisory Visits for TB Control</i> A. Introducing the module, reading and work through Exercise A B. Facilitator technique: leading a discussion C. Reading and work through Exercise B of the module D. Facilitator technique: individual feedback E. Reading and work through Exercise C of the module F. Reading and work through Exercise D of the module G. Self-assessment questions and concluding the module	3.5 hours
6. Module D: <i>Provide Training for TB Control</i> A. Reading and work on the module through Exercise A, group discussion B. Exercise B, group discussion and concluding the module	1.5 hours
7. Assignments for the next day – Read and work through module E – Read corresponding facilitator guidelines – Prepare for assigned activities	<i>completed as homework</i>

<b>Facilitator training day 2</b> (Guidelines follow on pages 43–46)	
<b>Activity</b>	<b>Time</b>
1. Module E: <i>Manage Drugs and Supplies for TB Control</i> (done as homework) <ul style="list-style-type: none"> <li>A. Practice of facilitator techniques</li> <li>B. Concluding module E</li> </ul>	1 hour
2. Module F: <i>Ensure Laboratory Support for TB Control</i> <ul style="list-style-type: none"> <li>A. Introducing the module</li> <li>B. Facilitator technique: while participants are working</li> <li>C. Exercise C, practice of individual feedback in pairs</li> <li>D. Concluding module F</li> </ul>	2.5 hours
3. Module G: <i>Monitor and Evaluate TB Control</i> <ul style="list-style-type: none"> <li>A. Practice of facilitator techniques</li> <li>B. Facilitator technique: conducting a demonstration</li> <li>C. Exercise B, practice of facilitator techniques</li> </ul>	3.5 hours
4. Assignments for the next day <ul style="list-style-type: none"> <li>–Read and work to the end of module G</li> <li>–Read corresponding facilitator guidelines</li> <li>–Prepare for assigned activities</li> </ul>	<i>completed as homework</i>

<b>Facilitator training day 3</b> (Guidelines follow on pages 47–49)	
<b>Activity</b>	<b>Time</b>
1. Continuation of module G: <i>Monitor and Evaluate TB Control</i> <ul style="list-style-type: none"> <li>A. Practice of facilitator techniques, review of module</li> <li>B. Concluding the module</li> </ul>	2 hours
2. Module H: <i>Advocacy and Collaboration for TB Control</i> <ul style="list-style-type: none"> <li>A. Reading and work on the module</li> <li>B. Practice of facilitator techniques</li> <li>C. Concluding the module</li> </ul>	2 hours
3. Module I: <i>Develop the District Plan of Action for TB Control</i> <ul style="list-style-type: none"> <li>A. Reading and work on the module through Exercise C</li> <li>B. Practice of facilitator technique, group discussions</li> </ul>	3 hours
4. Assignments for the next day <ul style="list-style-type: none"> <li>–Finish module I and read module J</li> <li>–Read corresponding facilitator guidelines</li> <li>–Prepare for assigned activities</li> </ul>	<i>completed as homework</i>

<b>Facilitator training day 4 (half-day)</b> <i>(Guidelines follow on pages 50–52)</i>	
<b>Activity</b>	<b>Time</b>
1. Continuation of module I: <i>Develop the District Plan of Action for TB Control</i> A. Practice of facilitator techniques B. Review of facilitator techniques	1 hour
2. Module J: <i>Field Exercise – Supervisory Visit</i>	1 hour
3. Practical arrangements for the course	
4. Closing remarks to facilitators	
5. Co-facilitators discuss plans for first day; arrange classroom if possible	2 hours

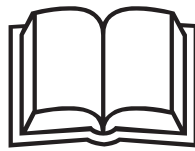
The remainder of this day may be used for a visit to a health facility in preparation for module J: *Field Exercise – Supervisory Visit*. The course director must visit the health facility(ies) at some point to prepare for module J. It is optional for the facilitator trainees to visit before the course.

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

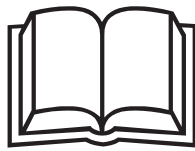
As a course director, you should be familiar with this course and have experience as a facilitator in this course or similar courses. To prepare to teach others to be facilitators, read this guide, and reread and study the *Facilitator Guide*.

When conducting the full facilitator training, keep available the schedule on pages 28–30 for an overview of the steps to be accomplished each day.

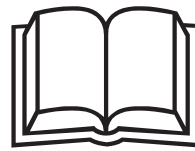
This section gives instructions, day by day and step by step, for conducting facilitator training. Just turn to the appropriate day and follow the instructions. Some instructions tell you to go to the *Facilitator Guide* and do certain steps described there. When you do that, leave *How to Organize Training for District TB Coordinators* open to keep your place. When you have finished the steps in the *Facilitator Guide*, look back to *How to Organize Training for District TB Coordinators* 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 District TB Coordinators*



*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 for 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 to District TB Coordinators the skills and knowledge specifically needed to plan, organize, implement and evaluate activities of a district TB control programme.

District TB Coordinators may oversee activities at health centres, hospital outpatient departments, dispensaries or health posts in the district. 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.

Another training course, *Management of Tuberculosis: Training for Health Facility Staff*, teaches health workers how 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. Neither course teaches basic medical techniques that should already be familiar to health workers, such as how to give injections or sterilize needles and syringes.

It is expected that participants will return to their jobs and make changes to improve TB case detection and management in their districts.

#### **Management of Tuberculosis Training for District TB Coordinators**

- Teaches skills and knowledge needed to plan, organize, implement, monitor, and evaluate activities of a district TB control programme
- For District TB Coordinators (one person or a team) responsible for overseeing TB case detection and treatment done in health facilities
- “Health facilities” include all types of health services that deliver outpatient care (e.g. health centres, hospital outpatient departments, dispensaries or health posts)

Slide 1

## 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 District TB Coordinators*, (*dates*).
- The participants will be district-level personnel responsible for planning, organizing, implementing, monitoring and evaluating activities of a district TB control programme.
- 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.

**Management of Tuberculosis  
Training for District TB Coordinators**

- Participants will be district-level personnel responsible for planning, organizing, implementing, monitoring and evaluating activities of a district TB control programme
- Facilitators assist participants to learn the procedures
- Facilitator training: 3½ days
- Facilitators work in pairs
- Each pair assigned a group of \_\_\_ participants
- \_\_\_ facilitators and \_\_\_ participants

Slide 2

### 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 materials all at once so that they may work ahead.

- Set of 12[<sub>km1</sub>] modules (A–L)
- N: *Facilitator Guide*
- Set of overhead transparencies

**Management of Tuberculosis  
Materials for facilitators**

- Set of 12 modules (A–L)
- N: *Facilitator Guide*
- Set of overheads

Slide 3

Answer sheets for the exercises are included in the *Facilitator Guide*. Separate answer sheets will be detached as needed from M: *Answer Sheets* to give to each participant. Participants may collect their answer sheets 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).

**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

Slide 4

- 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 based on an analysis of tasks involved in the job of a District TB Coordinator. Each module teaches the skills and knowledge 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 and group discussions.

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 learnt. 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 skills and knowledge. This course is structured to enable the

**Management of Tuberculosis**  
**Teaching methods**

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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



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 28–30. 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-8.

**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

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*. These pages provide 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 lead group discussions,
- to supervise the field exercise.

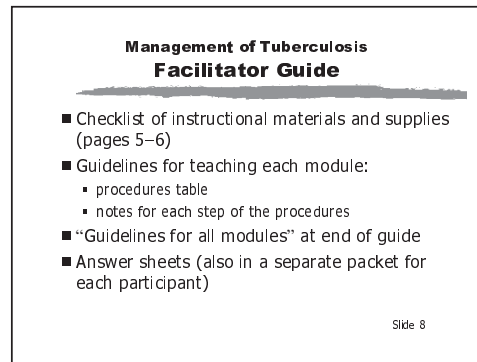
**Management of Tuberculosis  
Duties of a facilitator**

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

Slide 7

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 5–6 of *Facilitator Guide*),
- procedures table for each module,
- notes for each step of the procedures,
- 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 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: *Faba District***

Facilitator trainees will now begin module B: *Faba District*. 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 use of the overhead projector to introduce the map of Faba District.

Ask facilitator trainees to notice the instructions for introducing the module while 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 the module**

Ask trainees to quickly read pages 1–6 of the module, then to review the *District TB Plan* on pages 7–10.

Introduce the *District TB Plan* for the year 2004 in Faba District as described on pages B-2 and B-3 of the *Facilitator Guide*. Stress that participants will not need to study the *District TB Plan* carefully at the beginning of the course, but they should understand the purpose and format of the plan.

Proceed directly to module C: *Conduct Supervisory Visits for TB Control*.

#### **5. Module C: *Conduct Supervisory Visits for TB Control***

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, some of module C will be done differently.

##### **A. Introducing the module, reading and work through Exercise A**

Ask a facilitator trainee who is familiar with the course to introduce the module by following the guidelines on page C-2 of the *Facilitator Guide*. These include important information about the pictures and instructions that will guide participants through all of the modules. (*Note: Every time that a facilitator trainee practises a “facilitator technique,” such as introducing a module or giving individual feedback, record the practice on the Practice Assignment Grid on page 53 of this guide. The Practice Assignment Grid will help you keep track of who has practised which skills.*)

Ask participants to read pages 1–5 of the module and do the individual work on the written part of Exercise A.

## **B. Facilitator technique: leading a discussion**

Demonstrate how to lead the group discussion in Exercise A, being careful to use good facilitator techniques and to follow the steps in the *Facilitator Guide*, page C-3. Possible answers are on page C-4.

Point out that Exercise A 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*, which 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.

## **C. Reading and work through Exercise B of the module**

Point out procedure number 4 on page C-1 of the *Facilitator Guide*. Trainees will now do this part of the module. Ask them to read to the stop sign on page 15 and then do Exercise B on page 41. Point out that Exercise B requires individual feedback, as indicated in the “Feedback” column of the procedures table.

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

When trainees have finished Exercise B, point out the notes for giving individual feedback on page C-5 and the answers on pages C-6 and C-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. Both co-facilitators should 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*, page C-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 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 district. For example:
  - How are drugs distributed to health facilities in your district now?
  - How often do you visit health facilities in your district?

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 *Facilitator 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.

### **E. Reading and work through Exercise C of the module**

As instructed by the arrows in the module, trainees should go back to page 15 of the module and read until the stop sign on page 25. Ask a confident or experienced facilitator trainee to be prepared to practise individual feedback for part of this exercise (either situation A or B) in front of the group. Ask another trainee to be the “participant.” When the group has finished the exercise, ask these two trainees to model individual feedback.

During all practice of teaching techniques, trainees not actively involved 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 to trainees.

### **F. Reading and work through Exercise D of the module**

Remind trainees to consult the procedures table (page C-1) whenever they need to know what happens next. Point out that the group is now at step 6 and should go back to page 26 of the module to continue reading and do Exercise D individually. They will not practise giving individual feedback on this exercise today, but they should do it in the course. Tell them to check their own work using the answers in the *Facilitator Guide*.

After completing Exercise D, trainees should read section 8 of the module and the summary of important points (page 32).

### **G. Self-assessment questions and concluding the module**

When you see that most trainees have read the summary of important points, explain the purpose of the self-assessment questions that appear at the end of each module. Use the explanation on page C-13 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.

Conclude the module as instructed on pages C-13 and C-14 of the *Facilitator Guide*.

## **6. Module D: Provide Training for TB Control**

Assign facilitator trainees to introduce Module D and to lead the group discussions following Exercises A and B. Select trainees who have taken the course before or who finished Module C early, so that they have time to prepare. *Remember to keep track of assignments on the Practice Assignment Grid, page 53.*

\_\_\_\_\_ Introducing module D: *Provide Training for TB Control*

\_\_\_\_\_ Discussion, Exercise A (planning on-the-job training)

\_\_\_\_\_ Discussion, Exercise B (Depending on the time available, you may limit the discussion in Exercise B to Situation A only, or you may assign two different trainees to take Situations A and B.)

Remind the facilitator trainees to refer to the *Facilitator Guide* for instructions. A flipchart or blackboard will be needed for these discussions.

### **A. Work on the module through Exercise A, group discussion**

Point out the procedures for this module on page D-1 of the *Facilitator Guide*.

Ask the assigned facilitator trainee to introduce the module using the guidelines on page D-2 of the *Facilitator Guide*. Then trainees should quickly read pages 1–11 of the module and prepare for the discussion in Exercise A.

Ask the assigned facilitator trainee to lead the discussion in Exercise A. After the discussion, ask for comments on what was done well or could be improved.

### **B. Exercise B, group discussion, and concluding the module**

Ask trainees to continue reading pages 12–14 of the module and then prepare for the discussion in Exercise B. When everyone is ready, ask the assigned trainee(s) to lead the discussion. As always, provide comments to the trainee(s) after the discussion.

Ask trainees to read the Summary of Important Points and do the self-assessment questions on their own.



## 7. Assignments for the next day

*Note: Before assigning homework on module E: Manage Drugs and Supplies for TB Control, you must know how anti-TB drugs are ordered in the districts that will be represented by course participants. If drugs are ordered in pre-packaged kits, participants will use the main sections of the modules. If separate tablets are ordered, participants will use annexes that describe alternative procedures.*

Point out page E-1 of the *Facilitator Guide*. Explain that alternative procedures are given for districts that order separate tablets as opposed to pre-packaged kits of anti-TB drugs. Tell trainees which set of procedures they will follow in the course.

For homework, ask facilitator trainees to read all relevant sections of module E and do both exercises. Remind them that this is **NOT** how the work will be done in the actual course; **participants will not have homework**. Facilitator trainees 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. Also assign trainees to play the role of “participants” receiving individual feedback. Keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Introducing module E, as it will be done in the course

\_\_\_\_\_ Individual feedback, Exercise A, calculating quantities of anti-TB drugs to order for the district (facilitator guidelines on pages E-4 or E-9).  
Participant: \_\_\_\_\_

\_\_\_\_\_ Individual feedback, Exercise B, calculating quantities of anti-TB drugs to distribute to each health facility for the quarter (facilitator guidelines on pages E-6 or E-12). Participant: \_\_\_\_\_

\_\_\_\_\_ Introducing module F: *Ensure Laboratory Support for TB Control* (Note: In order to do this, the trainee will only need to read the Introduction to the module, and follow the facilitator guidelines on page F-2 of the *Facilitator Guide*.)

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*, all of modules E and F, and module G through Exercise D.

Make arrangements to have available an overhead projector and transparencies (pages All-11 through All-17 at the end of the *Facilitator Guide*) for the demonstrations of completing quarterly reports in module G.



## FACILITATOR TRAINING DAY 2

### 1. **Module E: *Manage Drugs and Supplies for TB Control***

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 E-1 of the *Facilitator Guide* and remind trainees which set of procedures will be followed in the course.

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

Ask the assigned trainee to introduce the module, following guidelines on pages E-3 and E-4 of the module.

Next, ask the assigned trainee to give individual feedback on Exercise A to the assigned “participant” 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 B. As always, provide constructive feedback after practice.

#### **B. *Concluding module E***

Ask the trainees how they did on the self-assessment questions. Answer any questions about the content of module E or procedures for conducting it.

### 2. **Module F: *Ensure Laboratory Support for TB Control***

#### **A. *Introducing the module***

Point out the procedures for this module on page F-1 of the *Facilitator Guide*.

Ask the assigned facilitator trainee to introduce module F.

Explain that trainees will read and work independently through Exercise C of this module, without taking time for individual feedback on Exercises A and B. This is to save time and is **not** the way to conduct the module during the course. In the course, individual feedback must be given after each exercise in this module. Remind trainees that you are available to answer any questions as they work.

Explain that, when trainees finish Exercise C, you will ask them to pair up, with one trainee practising giving individual feedback to another.

## **B. Facilitator technique: while participants are working**

Before trainees begin working independently on module F, point out that participants will have much independent reading and work in this and other modules, including the self-assessment questions at the end of each module. Facilitators should be available to help during this individual work, if needed.

Ask trainees to look at page All-5 of the *Facilitator Guide*, which gives a list of guidelines to follow when participants are working independently. 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.

As trainees work on module F, model the above behaviours.

## **C. Exercise C, practice of individual feedback in pairs**

As trainees finish Exercise C, divide them into pairs to practise individual feedback. Assign one person to act as a “facilitator” and the other as a “participant.” Ensure that each person has done the exercise and participates in individual feedback as either a “facilitator” or a “participant.”

After the practice, ask the trainees to mention problems that they had, or that they expect participants to have, completing Exercise C. (Some common errors are described on page F-6 of the *Facilitator Guide*.) Discuss how to prevent or correct these problems.

## **D. Concluding module F**

Ask trainees to finish the module by reading pages 12–22 and doing the self-assessment questions. Conclude the module as instructed on page F-10 of the *Facilitator Guide*.

Notice trainees who finish quickly and assign one of them to prepare to introduce module G: *Monitor and Evaluate TB Control*. Assign another to prepare to lead the group discussion in Exercise A of module G (either Situation 1 or 2, not both). If there is no time for trainees to prepare, you will need to do these two activities yourself.

### **3. Module G: *Monitor and Evaluate TB Control***

Point out the procedures for conducting this module on page G-1 of the *Facilitator Guide*. Explain that this module will require one full day during the course. The work is not extremely hard, but it is time-consuming and requires care. The facilitators can help participants to have a satisfying rather than frustrating experience by doing careful demonstrations with the overhead projector, and by checking participants' progress frequently during exercises.

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

Ask the assigned trainee to introduce the module as instructed on page G-2 of the *Facilitator Guide*. Trainees should then quickly read to the top of page 3 of the module and prepare for the group discussion in Exercise A.

Ask the assigned trainee to lead a discussion of either Situation 1 or 2 in Exercise A. (Note: In the actual course, groups will discuss both situations.) As always, after the discussion give constructive feedback to the trainee who led it.

Ask trainees to read pages 3–11 of the module and then stop for a demonstration.

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

Point out the facilitator guidelines on pages G-5 through G-7. These explain in detail how to conduct an important demonstration of how to transfer data from the *District TB Register* to a tally sheet and then complete a *Quarterly Report on TB Case Registration*. Following the guidelines in the *Facilitator Guide*, conduct the demonstration using the overhead projector. You may wish to ask a trainee to assist you in handling the transparencies as you move them on and off the projector.

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 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 others 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 and transparencies.

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

### **C. Exercise B, practice of facilitator techniques**

Ask trainees to do Exercise B and check their own answers.

Assign the following activities to be practised in front of the group when everyone has finished Exercise B. Keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Exercise B, individual feedback, pages G-7 through G-9 of *Facilitator Guide*. Participant: \_\_\_\_\_

\_\_\_\_\_ Demonstration, pages G-5 through G-7 of *Facilitator Guide*. This is the same demonstration that you did earlier, but it is necessary for each trainee to practise. Assign 3 or more trainees to demonstrate 2 or 3 cases each.

After practise of the above, and if there is time remaining in the day, trainees should continue working independently on module G.

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

Ask trainees to read and work to the end of module G: *Monitor and Evaluate TB Control*. Trainees should also read section G of the *Facilitator Guide*.

Assign the following activities to be practised in front of the group. Not all of the teaching activities in the module will be practiced, but trainees should familiarize themselves with all of them. Remember to keep track of assignments on the Practice Assignment Grid.

\_\_\_\_\_ Demonstration before Exercise C, page G-10 of *Facilitator Guide* (This demonstration is optional during the course, but it is a good chance to practise using the overhead projector. Assign two trainees to work together on this.) Give the trainees the overhead transparencies for this demonstration (Overheads C and D).

\_\_\_\_\_ Exercise A of module G, individual feedback, pages G-17 through G-19 of *Facilitator Guide*. Participant: \_\_\_\_\_

\_\_\_\_\_ Exercise F of module G, group discussion, pages G-20 through G-22 of *Facilitator Guide*. (Note: This is a complex discussion, so be careful to assign it to a trainee who can do a good job.)

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

Review the rest of module G and all of modules H and I. Review relevant pages of this guide and the *Facilitator Guide*.

## FACILITATOR TRAINING DAY 3

### 1. Continuation of module G: *Monitor and Evaluate TB Control*

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

#### A. *Practice of facilitator techniques, review of module*

Ask the assigned facilitator trainees to do the demonstration that comes before Exercise C in the module. Explain that this is an optional demonstration that should be used if participants are having difficulty with the tallying process. If participants had trouble with Exercise B, it would be helpful to begin Exercise C with this demonstration.

After the demonstration, ask the trainees if they had any difficulty with Exercise C. Answer questions and discuss the exercise as needed. Remind trainees that they will give individual feedback on this exercise in the actual course.

Referring to the procedures on page G-1 of the *Facilitator Guide*, begin with item 5 and briefly discuss each activity in turn, making sure that trainees did the exercises and checked their work. Answer any questions that trainees may have about the module content or exercises. Point out that there is another optional demonstration that may be used before Exercise D if needed (guidelines on page G-13 of the *Facilitator Guide*).

When you come to Exercise E, ask the assigned trainees to practise individual feedback in front of the group.

When you come to Exercise F, ask the assigned trainee to lead the group discussion.

As always, give constructive feedback after practise of facilitator techniques.

#### B. *Concluding the module*

Answer any remaining questions about the module and the self-assessment questions. Conclude the module.

### 2. Module H: *Advocacy and Collaboration for TB Control*

Point out the procedures for this module on page H-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. 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**

Ask trainees to read the module and do the written parts of the exercises as they come to them. 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 H-2 of *Facilitator Guide*

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

\_\_\_\_\_ Exercise B, group discussion, page H-4 of *Facilitator Guide*.

\_\_\_\_\_ Exercise C, group discussion, page H-4 of *Facilitator Guide*.

Note: Exercises B and C ask participants to relate ideas in the module to their own districts. To prepare for these discussions, facilitator trainees should think of districts with which they are familiar.

**B. Practice of facilitator techniques**

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

**C. Concluding the module**

Discuss any remaining questions about the module or the self-assessment questions,

**3. Module I: Develop the District Plan of Action for TB Control**

Point out the procedures for this module on page I-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. Introduce this module yourself, as described on page I-2 of the *Facilitator Guide*.

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

Ask trainees to read pages 1–5 of the module and do Exercises A, B and C. Trainees should check their own answers to Exercise A. Assign trainees to lead the discussions in Exercises B and C.

\_\_\_\_\_ Group discussion of Exercise B, pages I-4 and I-5 of the *Facilitator Guide*.

\_\_\_\_\_ Group discussion of Exercise C, pages I-6 and I-7 of the *Facilitator Guide*.

## **B. Practice of facilitator technique, group discussions**

When everyone has finished Exercise C, have the assigned trainees lead the group discussions for Exercises B and C. Be sure that trainees use the flipchart, as the group's ideas from these discussions will be used in Exercise D later. Advise the trainees to take notes during the discussions for use during their homework (Exercise D) to be done tonight.

As always, offer constructive feedback after practice.

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

For homework, ask trainees to finish module I, including Exercise D and the self-assessment questions. Trainees should check their own work to the exercises. They should also read module J: *Field Exercise – Supervisory Visit* and the corresponding facilitator guidelines. Assign the following activity:

\_\_\_\_\_ Exercise D of module I, group discussion, pages I-8 through I-10 of the *Facilitator Guide*

### ***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, e.g. where each small group will visit, and when they will go.

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. Continuation of module I: *Develop the District Plan of Action for TB Control***

Facilitator trainees should have finished the module the night before. Point out the procedures on page I-1 of the *Facilitator Guide* and emphasize that participants will do them in this order during the course.

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

Look to see that trainees have actually completed and written answers to Exercise D of the module. Answer any questions related to the written part of this exercise. Be sure that trainees understand the format of the *District TB Plan*.

Ask the assigned trainee to lead the group discussion of Exercise D, module I.

After the discussion, answer any questions about the module and the self-assessment questions; then conclude the module.

#### **B. 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*, which 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. Write 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 during 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. Module J: *Field Exercise – Supervisory Visit***

Explain how the field exercise will work; provide a schedule of visits; and explain about transportation to the health facility(ies). Answer any questions that facilitators may have about module J: *Field Exercise – Supervisory Visit* and related guidelines in section J of the *Facilitator Guide*. The field exercise will be discussed in more detail during a facilitator meeting during the course.

## **3. Practical arrangements for 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.

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(s) will be stored during the course.

Answer any questions about practical arrangements.

## **4. 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, and 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 full. 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.

## **5. Arranging classrooms, planning with co-facilitator**

Encourage co-facilitators to take time to plan together for the first day of the course and to set up their classrooms.

### 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 using overhead projector	Group discussion	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 District TB Coordinators**

- Teaches skills and knowledge needed to plan, organize, implement, monitor, and evaluate activities of a district TB control programme
- For District TB Coordinators (one person or a team) responsible for overseeing TB case detection and treatment done in health facilities
- “Health facilities” include all types of health services that deliver outpatient care (e.g. health centres, hospital outpatient departments, dispensaries or health posts)

Slide 1

# Management of Tuberculosis Training for District TB Coordinators

- Participants will be district-level personnel responsible for planning, organizing, implementing, monitoring and evaluating activities of a district TB control programme
- \_\_\_ 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

## **Management of Tuberculosis Materials for facilitators**

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- Set of 12 modules (A–L)
- N: *Facilitator Guide*
- Set of overheads



# **Management of Tuberculosis**

## **Objectives of facilitator training**

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- 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**

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- 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

# **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
- Lead group discussions
- Supervise the field exercise

# **Management of Tuberculosis Facilitator Guide**

- Checklist of instructional materials and supplies (pages 5–6)
- 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)

## 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 District TB Coordinators* 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 completed (including all exercises). They will review, 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 using an overhead projector to demonstrate how to complete a reporting form.

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 learnt 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 shortly 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 the times and arrangements for lunch, tea breaks, etc. are known. 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**

<b>Briefing day 1</b> <i>(Guidelines follow on pages 68–77)</i>	
<b>Activity</b>	<b>Time</b>
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	0.5 hour
3. Brief content review of modules A: <i>Introduction</i> and B: <i>Faba District</i>	0.5 hour
4. Demonstration and practice of facilitator techniques A. Introducing a module B. Working with a co-facilitator	0.5 hour
5. Brief content review of module C: <i>Conduct Supervisory Visits for TB Control</i>	1 hour
6. Demonstration and practice of facilitator techniques A. Leading a discussion B. Demonstration of individual feedback C. Practice of individual feedback	1 hour
7. Brief content review of modules D: <i>Provide Training for TB Control</i> , E: <i>Manage Drugs and Supplies for TB Control</i> , and F: <i>Ensure Laboratory Support for TB Control</i>	2 hours
8. Practice of selected facilitator techniques using modules D, E and F	1 hour
9. Assignments for the next day – Brief content review of remaining modules of course (G, H, I and J) – 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 G: <i>Monitor and Evaluate TB Control</i> A. Discussion of module B. Demonstration using overhead projector C. Practice using overhead projector	2 hours
2. Module H: <i>Advocacy and Collaboration for TB Control</i> A. Discussion of module B. Practice of group discussion	1 hour
3. Module I: <i>Develop the District Plan of Action for TB Control</i> A. Discussion of module B. Practice of facilitator techniques	1.5 hours
4. Practical arrangements for the course, including field exercise	0.5 hours
5. Closing remarks to facilitators	0.5 hours
6. Planning time for co-facilitators	2 hours

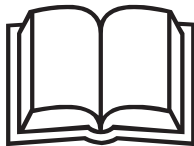


### 6.3 Using this guide to conduct the briefing

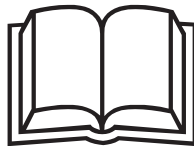
As a course director, you should be familiar with this course and have experience as a facilitator in this course or similar courses. To prepare to brief facilitators, read this guide, and reread and study the *Facilitator Guide*.

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

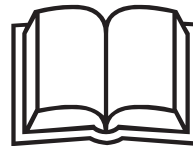
This section gives instructions, day by day and step by step, for conducting the briefing. Just turn to the appropriate part of the appropriate day, and follow the instructions. Some instructions tell you to go to the *Facilitator Guide* and do certain steps described there. When you do that, leave *How to Organize Training for District TB Coordinators* open to keep your place. When you have finished the steps in the *Facilitator Guide*, look back to *How to Organize Training for District TB Coordinators* 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 District TB Coordinators*



*Facilitator Guide*



*Module*

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

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## BRIEFING DAY 1

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### 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 facilitators 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 District TB Coordinators*,
- 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 District TB Coordinators the skills and knowledge specifically needed to plan, organize, implement and evaluate activities of a district TB control programme.

District TB Coordinators may oversee activities 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.

Another training course, *Management of TB: Training for Health Facility Staff*, teaches health workers how 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 in health facilities. Neither course teaches 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 jobs and make changes to improve TB case detection and management in their districts.

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

Cover the following points:

- There will be (*number*) participants attending the course titled *Management of Tuberculosis: Training for District TB Coordinators*, (*dates*).
- The participants will be district-level personnel responsible for planning, organizing, implementing, monitoring and evaluating activities of a district TB control programme.
- 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 21).

#### **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 12 modules (A–L)
- N: *Facilitator Guide*
- Set of overhead transparencies

Answer sheets for the exercises are included in the *Facilitator Guide*. Separate answer sheets will be detached as needed from M: *Answer Sheets* to give to each participant. Participants may collect their answer sheets in a packet.

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

During the 2-day briefing, facilitators will:

- Review the course content.
- Review expected facilitator behaviours and techniques.
- Practise selected teaching techniques that may be less familiar (for example, doing demonstrations 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 facilitators 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 facilitators to quickly read pages 1–5 of the *Facilitator Guide*. Since they have been facilitators in other courses, this information 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 5–6 of the *Facilitator Guide*),
  - procedures table for each module,
  - notes for each step of the procedures,
  - 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 definitely 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 facilitators have previously served in this role, they may wish to share their past experiences (positive and negative) and lessons learnt 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 facilitators 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 for suggestions and tips, based on their experience, for conducting the following teaching activities:

- individual feedback
- group discussions
- demonstrations using the overhead projector
- 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: *Faba District***

Allow 30 minutes for facilitators to quickly review the contents of these modules. Since facilitators are already familiar with this course, this review is just to refresh their memories.

## **4. Demonstration and practice of facilitator techniques**

### **A. *Introducing a module***

Demonstrate introducing module B and the map of Faba District as described on page B-2 of the *Facilitator Guide*. Use the overhead projector when describing the map of Faba District.

Ask trainees to notice the instructions for introducing the module as you speak. 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*.

Tell facilitators that, from now on, you will ask one of them to introduce each module. Ask for a volunteer to practise introducing module C: *Conduct Supervisory Visits for TB Control* (guidelines on page C-2 of the *Facilitator Guide*). This introduction includes an explanation of the pictures that will guide participants through the modules (e.g. the stop sign, pencil). When the volunteer has finished doing the introduction, the group may offer feedback.

## **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 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.

## 5. Brief content review of module C: *Conduct Supervisory Visits for TB Control*

Each module will be reviewed briefly so that facilitators can refresh their memories of the module. Suggest that a good 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.

Allow about 1 hour for facilitators to review the contents of module C. As some of the facilitators finish, make the following assignments:

\_\_\_\_\_ One facilitator to be prepared to lead the group discussion in Exercise A.

\_\_\_\_\_ One facilitator to be prepared to act as a “course participant” when you demonstrate individual feedback on Exercise B. This person will need to have answers written in the module for Exercise B, perhaps including a wrong answer or two.

\_\_\_\_\_ One facilitator to be prepared to practise individual feedback for part of Exercise C (either situation A or B) in front of the group. Ask another to be the “participant”: \_\_\_\_\_

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

## 6. Demonstration and practice of facilitator techniques

### A. *Facilitator technique: leading a discussion*

Ask facilitators 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, facilitators will practise leading the group discussions.

Ask the assigned facilitator to practise leading the group discussion in Exercise A, being careful to use good facilitator techniques and to follow the steps in the *Facilitator Guide*, page C-3. Possible answers are on page C-4.

Point out that Exercise A 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.

### **B. Facilitator technique: 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 giving individual feedback on Exercise B. Use the notes for giving individual feedback on page C-5 and the answers on pages C-6 and C-7.

Ask the assigned facilitator 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.”

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 two chairs in the hall to make a place for giving individual feedback. The other facilitator could pull two chairs to 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 district. For example:
  - How are drugs distributed to health facilities in your district now?
  - How often do you visit health facilities in your district?

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



### **C. Practice of individual feedback**

Ask the assigned facilitators to model individual feedback on Exercise C (Situation A or B).

During all practice of teaching techniques, facilitators who are not actively involved 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 that facilitators 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 to facilitators.

## **7. Brief content review of modules D: *Provide Training for TB Control*, E: *Manage Drugs and Supplies for TB Control*, and F: *Ensure Laboratory Support for TB Control***

This review is to refresh the facilitators’ memories of the modules. 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.

Allow about 2 hours to review the modules. (Note: You may break this into three shorter time periods if you wish, pausing at the end of each module for the relevant practice listed below.) As facilitators are working, model the behaviours listed on page All-5 of the *Facilitator Guide*, titled “When participants are working.” Make the following assignments:

\_\_\_\_\_ One facilitator to be prepared to lead the group discussion in Exercise A of module D: *Provide Training for TB Control* (planning on-the-job training, guidelines on page D-2 of the *Facilitator Guide*).

\_\_\_\_\_ One facilitator to be prepared to practise individual feedback for Exercise A of module E in front of the group (calculating quantities of anti-TB drugs to order for the district, guidelines on pages E-4 or E-9 of the *Facilitator Guide*). Another facilitator to be the “participant”: \_\_\_\_\_  
*Note: Use the version of the exercise that will be used in the course.*

Be sure that everyone completes Exercise C of module F (confirming registration of all smear-positive cases in the *District TB Register*). All facilitators will practise giving individual feedback on this exercise by dividing into pairs for practice.

## 8. Practice of selected facilitator techniques using modules D, E and F

Ask assigned facilitators to lead a discussion (Exercise A, module D) and conduct individual feedback in front of the group (Exercise A, module E).

Divide facilitators into pairs to practise individual feedback on Exercise C of module F. Assign one person to act as a “facilitator” and the other as a “participant.” Ensure that each person has done the exercise and participates in individual feedback as either a “facilitator” or a “participant.”

After the practice, ask the trainees to mention problems that they had, or that they expect participants to have, when completing Exercise C of module F. (Some common errors are described on page F-6 of the *Facilitator Guide*.) Discuss how to prevent or correct these problems.

## 9. 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 (G, H, I and J).
- 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 G: *Monitor and Evaluate TB Control***

\_\_\_\_\_ Demonstration, pages G-5 through G-7 of *Facilitator Guide*. You will  
\_\_\_\_\_ conduct this demonstration as an example; then facilitators will practise it.  
\_\_\_\_\_ Assign 3 or more facilitators to demonstrate 2 or 3 cases each. Explain that  
you will have the overhead transparencies available. Paper copies of  
overheads are in the back of the *Facilitator Guide*.

\_\_\_\_\_ Demonstration before Exercise C, page G-10 of *Facilitator Guide*. (This  
\_\_\_\_\_ demonstration is optional during the course, but it is a good chance to  
practise using the overhead projector. Assign two people to work together on  
this as co-facilitators.) Explain that you will have the overheads  
available. Paper copies are in the back of the *Facilitator Guide*.

### **From module H: *Advocacy and Collaboration for TB Control***

\_\_\_\_\_ Group discussion, Exercise B (collaborating with organizations in the  
district)

### **From module I: *Develop the District Plan of Action for TB Control***

\_\_\_\_\_ Group discussion, Exercise B (planning activities to solve a problem)

\_\_\_\_\_ Group discussion, Exercise C (expansion of TB control services in Faba District)

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

Make sure that overhead transparencies are prepared for the demonstrations.

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.

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## BRIEFING DAY 2

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### 1. Module G: *Monitor and Evaluate TB Control*

#### 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 the next section.

Explain that this module will require one full day during the course. The work is not extremely hard, but it is time-consuming and requires care. The facilitators can help participants to have a satisfying rather than frustrating experience by doing careful demonstrations with the overhead projector, and by checking participants' progress frequently during exercises.

#### B. *Demonstration using overhead projector*

Point out the facilitator guidelines on pages G-5 through G-7. These explain in detail how to conduct an important demonstration of how to transfer data from the *District TB Register* to a tally sheet and then complete a *Quarterly Report on TB Case Registration*. Following the guidelines in the *Facilitator Guide*, conduct the demonstration using the overhead projector. You may wish to ask a facilitator to assist you in handling the transparencies as you move them on and off the projector.

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 others 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 and transparencies.

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

### **C. Practice using overhead projector**

Ask the assigned facilitators to demonstrate, in turn, tallying of 2 or 3 cases from the demonstration that you have just done. This will allow facilitators to become familiar with the projector, and the repetition will emphasize the importance of this demonstration.

Next, ask the assigned facilitators to do the demonstration that comes before Exercise C in module G. Explain that this is an optional demonstration that should be used if participants are having difficulty with the tallying process. If participants have trouble with Exercise B, it would be helpful to begin Exercise C with this demonstration.

Point out that there is another optional demonstration that may be used before Exercise D if needed (guidelines on page G-13 of the *Facilitator Guide*).

## **2. Module H: Advocacy and Collaboration for TB Control**

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

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

### **B. Practice of group discussion from module H**

Ask the assigned facilitators to lead the group discussion from Exercise B. Note: Exercise B asks participants to relate ideas in the module to their own districts. In this discussion, facilitators should think of districts with which they are familiar.

As always, provide constructive feedback after the discussion.

## **3. Module I: Develop the District Plan of Action for TB Control**

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

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

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

Have the assigned facilitators lead the group discussions from Exercises B and C of module I. Be sure that facilitators write the group's ideas on the flipchart, as the results of these discussions will be used in Exercise D later.

After each group discussion, provide constructive feedback, particularly on use of the flipchart.

When both discussions have been completed, have the group turn to Exercise D in the module (pages 28–39, module I). Point out how the group’s answers from the discussions in Exercises B and C are used in Exercise D. Point out where the activities should be recorded in the *District TB Plan* and *Planning Chart*. Activities related to transporting sputum samples (from Exercise B) should be recorded in section A4: Laboratory Support of the *District TB Plan* and *Planning Chart*. Activities related to training needed to expand TB control services (from Exercise C) should be recorded in section B2: Training.

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

Explain how module J: *Field Exercise – Supervisory Visit* will work; describe when and where the field exercise will occur; and explain about transportation to the health facility(ies). When they have time, facilitators should reread module J and related guidelines in section J 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.

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.

#### **5. 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 full. 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.

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

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





## 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 to health care in the country, and the role of this course in improving TB control. 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*.

**7.3****Performance criteria for facilitators**

*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 district 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: using the overhead projector in a demonstration**

- a. Has materials organized before beginning the demonstration
- b. Writes clearly on the overhead and points to the relevant sections of the register or report being demonstrated
- c. Follows the instructions for the demonstration given in the *Facilitator Guide*
- d. Keeps the demonstration interesting by actively involving participants, asking them questions, getting them to write on their own copies of the report, etc.

**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 related to the module(s) for 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,
  - communicate clearly,
  - help others and work well with others in their group, and
  - participate confidently in discussions.

## **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: \_\_\_\_\_

Best mailing address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name and address  
of office  
where you work:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What is your current work position or job title?

What are your current duties related to TB control activities?

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?

Have you participated in any training related to TB control? If so, please tell the course name and the year you participated.

### Summary Participant List

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

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

Name	Best mailing address	Name of your district	Current position or job title

## Course Director Summary

### Management of Tuberculosis: Training for District TB Coordinators

**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		
C: Conduct Supervisory Visits for TB Control		
D: Provide Training for TB Control		
E: Manage Drugs and Supplies for TB Control		
F: Ensure Laboratory Support for TB Control		
G: Monitor and Evaluate TB Control		
H: Advocacy and Collaboration for TB Control		
I: Develop the District Plan of Action for TB Control		
J: Field Exercise – Supervisory Visit		

**\*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, by assessing participants' work on written exercises, 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 District TB Coordinators

1. Do you have some responsibility for TB control activities in your district?  
(Tick ✓) \_\_Yes \_\_\_\_No

What are your primary responsibilities for TB (tick all that apply):

- Recording cases in the *District TB Register*
- Supervisory visits to health facilities
- Ordering anti-TB drugs and supplies
- Visits to TB microscopy units
- Training staff about TB
- Monitoring and evaluating TB
- Writing a *District Plan of Action for TB Control*
- Other:
- Other:

What is your job title or position?

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: Faba District				
C: Conduct Supervisory Visits for TB Control				
D: Provide Training for TB Control				
E: Manage Drugs and Supplies for TB Control				
F: Ensure Laboratory Support for TB Control				
G: Monitor and Evaluate TB Control				
H: Advocacy and Collaboration for TB Control				
I: Develop the District Plan of Action for TB Control				
J: Field Exercise – Supervisory Visit				



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			
Group discussions			
Self-assessment questions			
Field exercise—supervisory visit			
Entire course			

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

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 districts. 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**

- The use of a new *District TB Register* is being introduced throughout the country. District TB Coordinators do not know how to use the new register. A partial course to address this problem might include module C: *Conduct Supervisory Visits for TB Control* and G: *Monitor and Evaluate TB Control*. Module C would teach participants how to register cases during supervisory visits, and module G would teach them how to use the *District TB Register* to complete quarterly reports and monitor TB control efforts.
- Two years ago, many district TB Coordinators attended a course that included all of the modules except module F: *Ensure Laboratory Support for TB Control*. At that time, there were only a few TB microscopy units in hospitals, and they were considered adequate. Now, the programme needs more TB microscopy units, and each District TB Coordinator will participate in discussions on where to put them. A partial course could be conducted using module F: *Ensure Laboratory Support for TB Control* and any other modules that need review.
- District TB Coordinators are correctly managing TB control services in public health facilities, but they have not been taught ways to expand services by collaborating with other programmes (such as the HIV/AIDS programme) and private providers. A partial course to address this issue could include module H: *Advocacy and Collaboration for TB Control*.

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 do additional exercises using real *District TB Registers* from the participant's districts.

#### **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, 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	37	All-4
Leading a discussion	39	All-7
Individual feedback	39–40	All-6
Conducting a demonstration (using overhead projector)	45	–
While participants are working	44	All-5

For example, module G: *Monitor and Evaluate TB Control* requires facilitators to provide individual feedback on written exercises, do demonstrations using the overhead projector, and lead group discussions. To prepare to teach module G, facilitators must learn about 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. 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 staff, under careful supervision. On-the-job training may be used for reinforcement or retraining when a problem is identified, or to orient new District TB Coordinators until they can attend a full course.

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

- A trainer from the provincial level of the TB control programme does a few hours of individual training when visiting each District TB Coordinator in the province.
- A provincial-level supervisor notices a problem that is caused by District TB Coordinators' lacking certain skills or information. The supervisor wants to correct this problem quickly through on-the-job training.
- A District TB Coordinator has been promoted to a new job and can orient and train the new District TB Coordinator 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>	Reading relevant sections of the modules Studying "job-aids" (such as the Supervisory Checklist in module C: <i>Conduct Supervisory Visits for TB Control</i> ) Listening to someone explain procedures
<b>Examples</b>	Following and observing an experienced, trained District TB Coordinator who is performing TB-related tasks Examining forms from health facilities, such as <i>TB Treatment Cards</i> , in relation to a completed <i>District TB Register</i> Reviewing informational and promotional materials used for advocacy in other districts
<b>Practice</b>	Doing written exercises adapted from the modules with real health facility data and real <i>TB Treatment Cards</i> Doing the actual work of the District TB Coordinator (e.g. conducting a supervisory visit to a health facility) while a supervisor or trainer observes and gives feedback Completing an order for anti-TB drugs for a district for a quarter and having it reviewed by a supervisor

If provincial-level supervisors of 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 District TB Coordinators*, 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 provincial-level supervisor might use to review all of module E: *Manage Drugs and Supplies for TB Control* with previously trained staff, or to train new staff.
- Example 2 describes on-the-job training to solve a particular problem using part of module G: *Monitor and Evaluate TB Control*.
- Example 3 describes focused on-the-job training in a specific task taught in module C: *Conduct Supervisory Visits for TB Control*.

**Example 1** Note: This plan is for a district in which pre-packaged drug kits are used.

**On-the-job training using module E: *Manage Drugs and Supplies for TB Control***

**Information**

The trainee(s) reads or reviews pages 1–12 of the module.

Describe decisions made at the national level about standard drug regimens, the presentations and packaging of anti-TB drugs to be provided for the district and the management of supplies (decisions listed on page 1 of module).

**Examples**

Show actual kits to be used in the district for categories I and III and for category II. Show the number of tablets of each FDC or other drug in the kits. Show syringes if included in Category II kits.

Demonstrate how to adapt kits for children and patients not in the average weight band.

Visit the district storeroom with the trainee to observe stocks of anti-TB drugs and TB-related supplies such as sputum containers. (While there, the trainee counts stock available, or checks an inventory report to determine stock available.)

**Practice**

The trainee completes an adapted Exercise A (calculating quantities of anti-TB drugs to order for the district) using real data from the *District TB Register* from the previous quarter, as well as real information on stocks currently available in the district storeroom. During the practice, give suggestions as needed to ensure that the trainee completes the *Ordering Worksheet* correctly.

**Information**

The trainee(s) reads or reviews pages 12–18 of the module.

**Example**

As a demonstration, complete the *Distribution Worksheet* (pages 17 and 41 of the module) for one health facility in the district.

**Practice**

The trainee completes *Distribution Worksheets* for the rest of the health facilities in the district.

**Information**

The trainee reads pages 18–25 of the module.

**Practice**

The trainee answers the self-assessment questions at the end of the module and checks the answers (pages 28–29 of the module). Discuss as needed.

## **Example 2**

District TB Coordinators correctly complete and send quarterly reports to the provincial level, but they do not use the information in the reports to monitor sputum conversion and treatment outcome indicators for the district. It appears that District TB Coordinators do not know how to calculate and interpret these indicators. The provincial-level 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 30–33 of module G: *Monitor and Evaluate TB Control*. Provide a copy of page 32 of the module about analysis of indicators.

#### **Example**

Demonstrate how to calculate indicators using information from quarterly reports from Faba District as in Exercise F of the module.

#### **Practice**

Discuss the indicators from Faba District and possible interpretations.

The trainee calculates indicators (sputum conversion rate and treatment outcome rates) using actual quarterly reports from the district. Provide help as needed. Discuss possible interpretations.

### **Example 3**

A trained, experienced District TB Coordinator will soon be leaving for a new job. Before leaving, she is training the new District TB Coordinator on the job. The new coordinator accompanies the experienced coordinator and learns much by observing and asking questions. The experienced coordinator devotes special attention to teaching the more complex tasks, such as completing the *District TB Register* during a supervisory visit to a health facility.

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

##### **Information**

Explain the information on pages 7–15 of module C: *Conduct Supervisory Visits for TB Control*. Provide a copy of these pages (or the entire module) for the new District TB Coordinator to read.

##### **Example**

Allow the new District TB Coordinator to observe as you review *TB Treatment Cards* at a health facility, register recent cases, and update entries on cases previously registered. Point out cases that require you to question or remind the health facility staff of something (e.g. the need for a follow-up sputum examination, the need to find a patient who has missed doses). Allow the new District TB Coordinator to observe as you confer with the health facility staff.

##### **Practice**

At the next health facility visited, observe as the new District TB Coordinator reviews *TB Treatment Cards*, registers recent cases, updates entries on cases previously registered, and identifies concerns to discuss with health facility staff. Offer help as needed and provide feedback.

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 group discussions) 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 new District TB Coordinator may be appointed at a time when a training course is not immediately available. The new District TB Coordinator may be given the course materials to work through until he or she can attend the course.
- A nongovernmental organization may request that its health staff in the area be provided with the course materials to help ensure that TB control services are consistent with those provided at Ministry of Health facilities.

The course materials should not be sent out 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 District TB Coordinators may learn well independently if supported by a supervisor who can answer questions and ensure completion of the modules.