

INTERNATIONAL STANDARDS FOR TUBERCULOSIS CARE
TRAINING MODULES

Facilitator's Guide



Developed by the Tuberculosis Coalition for Technical Assistance (TBCTA)



TBCTA Partners:

American Thoracic Society
Centers for Disease Control and Prevention (US)
Family Health International
International Union Against Tuberculosis and Lung Diseases (The Union)
Japan Antituberculosis Association
KNCV Tuberculosis Foundation
Management Sciences for Health
World Health Organization

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**Development coordinated by the American Thoracic Society
and the Francis J. Curry National Tuberculosis Center**



FRANCIS J. CURRY
NATIONAL
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List of Abbreviations

AFB	Acid-fast bacilli	NRTI	Nucleoside reverse transcriptase inhibitors
ART	Antiretroviral therapy	NNRTI	Non-nucleoside reverse transcriptase inhibitors
ARV	Antiretrovirals	NVP	Nevirapine
ATS	American Thoracic Society	PAS	Para-aminosalicylate
CD4	Subgroup of T-lymphocyte cells carrying CD4 antigen	PCP	<i>Pneumocystis jiroveci</i> pneumonia
CDC	Centers for Disease Control and Prevention	PI	Protease inhibitors
CNS	Central nervous system	PZA	Pyrazinamide
CPT	Cotrimoxazole preventative therapy	RIF	Rifampicin
CS	Cycloserine	TB	Tuberculosis
CTX	Cotrimoxazole	TBCTA	Tuberculosis Coalition for Technical Assistance
CXR	Chest x-ray	USAID	United States Agency for International Development
DOT	Directly observed treatment	WHO	World Health Organization
DOTS	The internationally recommended strategy for tuberculosis control	XDR	Extensively drug-resistant
DST	Drug susceptibility testing	ZN	Ziehl-Neelsen staining
EFV	Efavirenz		
EMB	Ethambutol		
EPTB	Extrapulmonary tuberculosis		
ETH	Ethionamide		
GI	Gastrointestinal		
HIV	Human immunodeficiency virus		
HPLC	High performance liquid chromatography		
INH	Isoniazid		
IRIS	Immune-reconstitution inflammatory syndrome		
ISTC	<i>International Standards for Tuberculosis Care</i>		
IUATLD	International Union Against Tuberculosis and Lung Disease (The Union)		
KNCV	Royal Netherlands Tuberculosis Foundation		
LAMP	Loop-mediated isothermal amplification		
LTBI	Latent tuberculosis infection		
MDR	Multidrug-resistant		
M. tb	Mycobacterium tuberculosis		
NAAT	Nucleic acid amplification test		

Overview of ISTC Training Modules

In 2005 and 2006, the *International Standards of Tuberculosis Care (ISTC)* was developed in response to the need to unify approaches to tuberculosis care between private and public providers on an international level. The *ISTC* is a widely endorsed level of care that all practitioners, public and private, should seek to achieve in managing patients who have, or are suspected of having, TB. It is not intended to replace WHO or local guidelines and was written to accommodate local differences in practice.

Developed in tandem with the *ISTC*, the *Patients' Charter for Tuberculosis Care* describes patients' rights and responsibilities from a patient's perspective. In 2007, the *Handbook for Using the International Standards for Tuberculosis Care* was developed to present guidance and suggestions, based on country-level experiences, for using the *ISTC* as a tool to foster and guide the delivery of high quality care by all practitioners providing tuberculosis services. The ISTC Training Modules represent the next phase in the utilization of the *ISTC*.

The ISTC Training Modules are educational resource tools, developed to assist in the incorporation of the *ISTC* into training courses and curricula on tuberculosis. The material is comprehensive in its coverage of core topics in the clinical evaluation and management of tuberculosis and is presented in a format that is flexible and adaptable to various training needs. While the modules may be used as core presentations for courses on tuberculosis, the ISTC Training Modules material should also be viewed as a tuberculosis "training resource library" offering easy access to specific *ISTC* material, individual slides, images or graphics as needed to update or augment existing training materials.

The planning and development of the ISTC Training Modules was guided by members of the original *ISTC* steering committee and through significant input from *ISTC* implementation pilot countries. Through an informal assessment of needs from country-level input and steering committee members, a didactic PowerPoint slide format was chosen as most useful for easy adaptation by training groups for a target learner audience of private and public physicians. Selected material may also be appropriate for other learner groups including pre-service healthcare trainees, nurses, and health officers.

A total of nine modules are included in the ISTC Training Modules. Core topics in tuberculosis diagnosis, treatment, and public health responsibilities are covered in the modules, highlighting the relevant *ISTC* standards as they address the basic principles of care for persons with, or suspected of having, tuberculosis. Additional materials provided with the slide-sets include instructor Teaching Notes, a brief Introduction to the *ISTC* slide-set, a Facilitator's Guide (includes sample *ISTC* course agendas), instructions for producing Participant Manuals, and Evaluation and Training Tools (includes Training Module Test Questions). A complete listing of the materials available follows in the next section of this guide: Organization of the ISTC Training Modules.

Draft versions of the ISTC Training Modules have been pilot-tested in a variety of settings. The successful adaptation and incorporation of the *ISTC* material by these pilot groups offers examples of how the ISTC Training Modules may be used.

- **Training curriculum for practicing physicians (private and public):** Materials from the ISTC Training Modules were adapted for use in a comprehensive set of training material developed to teach providers about new national tuberculosis guidelines (which incorporated the ISTC) in the Caribbean. In-country educators piloted the material in three separate trainings sessions.
- **Specialty workforce training:** Select materials from the ISTC Training Modules were used by outside experts as part of a training course for physicians, nurses, and clinical staff at a new national MDR-referral hospital in Tanzania.
- **Pre-service training:** Collaboration between the National Tuberculosis and Leprosy Program (NTLP) and six medical schools and Allied Health Sciences in Tanzania resulted in a unified curriculum on tuberculosis integrating the *ISTC*. Materials from the ISTC Training Modules were used in the development of the final curriculum.
- **Professional Societies:** Plans are underway for the use of the ISTC Training Modules for trainings sponsored by local professional societies for continuing education courses featuring the *ISTC*.

Organization of ISTC Training Modules

The materials provided in the ISTC Training Modules can be viewed and downloaded at the www.istcweb.org website.

The materials are organized into the following three electronic storage folders:

- **ISTC Training Modules**
- **Facilitator Materials**
- **ISTC Documents**

ISTC Training Modules

The ISTC Training Modules consist of nine training slide-sets that incorporate the *Standards* and are organized by the following content areas:

TRAINING MODULE	STANDARD
Clinical Presentation and Diagnosis of Tuberculosis*	Standard 1, 2, 3, 4, 5
Microbiologic Diagnosis of Tuberculosis	Standard 2, 3, 4, 5, 6, 10, 14
Initial Treatment of Tuberculosis	Standard 7, 8, 10, 11, 17
Fostering and Assessing Adherence to Treatment	Standard 9
Tuberculosis and HIV infection: Introduction and Diagnosis	Standard 2, 3, 12
Tuberculosis and HIV infection: Treatment	Standard 8, 13
Drug-Resistant Tuberculosis	Standard 14
Management of Drug-Resistant Tuberculosis	Standard 15
Contact Evaluation	Standard 16
Additional Material	
Introduction to the ISTC (15 minute)	Brief introductory slides for ISTC
Introduction to the ISTC (with Standards)	Slides as above with the addition of all 17 Standards in slide format

* Module also available in version with PowerPoint animation

Facilitator Material

This folder contains material and tools that offer guidance and assistance in the development of training courses using the ISTC Training Modules.

More detailed information regarding the Teaching Notes and Summary Teaching Note document, Evaluation and Training Tools, and Participant Manual are covered in the Resources and Tools section of this Facilitator's Guide.

Facilitator's Guide

- Background information and guide to using ISTC Training Modules
- Tips for Course Development and Facilitation and Sample Agendas
- Explanation and guide to Resources and Tools
- Instructions for making a Participant Manual

Summary of Teaching Notes

- Word document of slides with Teaching Notes for all modules

Evaluation and Training Tools

- ISTC Training Modules Test Questions
- Course Evaluation forms
- Sample participant sign-in sheet, name tags, certificates

ISTC Documents

Copies of the *ISTC* documents in electronic pdf files are included with the training information to allow easy access to original *ISTC* source material. These include:

- International Standards for Tuberculosis Care (ISTC)
- Patients' Charter for Tuberculosis Care
- Handbook for Using the International Standards for Tuberculosis Care

Resources and Tools

Teaching Notes and Summary Teaching Notes Document

Teaching Notes for individual modules:

Each ISTC Training Module is annotated with a set of Teaching Notes as an adjunct to the instructor, offering speaking points, background material, and interactive tips.

There are two ways to navigate within PowerPoint to view the Teaching Notes.

- Click **View** on the main toolbar for the following choices:
 - Choosing **Notes Page** view allows a full view of each slide with teaching notes. Notes may be printed in this format by choosing the Notes Page choice within the print options. (See Summary Teaching Notes for an alternate way to view and/or print notes.)
 - Choosing **Normal View** the notes appear in a window directly under the slide and require the use of the adjacent scrollbar to view completely.

Instructor's Guide located in the Teaching Notes:

Each module contains an overview for the instructor on the first page of Teaching Notes (located with the title slide). The Instructor's Guide will always include the following material as it pertains to the specific ISTC Training Module:

Instructor's Guide (in the Teaching Notes)

- **Module:** Name of module
- **ISTC Standards covered:** Lists *Standards* included in the module
- **Module Time:** Gives approximate duration for presenting the module
- **Alternate slides:** Extra or alternate slide options are offered that may be included in the presentation at the discretion of the instructor. Included are slides that may be used for a quick explanation of the *ISTC* if needed
- **Interactive options:** Ideas and prompts for interactive options to support active-learning within modules
- **Slide-show Animation:** Alerts instructor if slide-show contains animation
- **Additional Material:** Suggests other ISTC Training Modules that may have related material
- **Other useful Resources/References:** Lists relevant resources
- **Test Questions:** Test Questions based on learning objectives are attached at the end of each module in slide format, if needed

Teaching Note Summary document:

The Teaching Notes Summary document is a handy reference for Instructors containing the Teaching Notes for the nine ISTC Training Modules with “thumbnail” slide images. This format offers a single quick reference source for all of the ISTC Training Modules material consolidated into a printable Word document. (As noted above, this electronic document is located in the Facilitator Material Folder.)

Participant Manual

The slide-sets of the ISTC Training Modules can be easily transformed into handout format to produce a useful Participant Manual. To make a print handout version of the slide presentation:

- Click **Print**
- Next, specify what to print by choosing **Handouts**
- Then specify color/grayscale choice (text clarity and a reduction in cartridge ink use may be best if **Pure Black and White** is chosen, but some image detail may be better in **Grayscale**)
- Choose **slides per page** (3 slides per page has lined space for note-taking)
- Specify **number of copies**, then click **Okay** to print

Any course syllabus, key articles, case discussion material, small group activity material, or other interactive discussion information that accompanies the slide presentations could also be added to the Participant Manual.

Note: The material in the Teaching Notes of the ISTC Training Modules has been written as an adjunct for the Instructor utilizing the modules. The material in these notes has not been written for a “learner” audience. Key explanations and teaching points from these notes may serve as a basis for the development of a learner syllabus, but significant adaptation is recommended.

Evaluation and Training Tools

ISTC Training Modules Test Questions

Test Questions have been developed for each of the ISTC Training Modules which reflect the module content and objectives. The ISTC Training Modules Test Questions may be adapted to training needs and can serve either as an evaluation tool or as an instructional device for interactive discussions.

Use as an evaluation tool:

The Test Questions may be used to assess the knowledge and skills of participants before and after participating in a training course by consolidating them into a course Pre-test and Post-test (the exact same questions should be used for both and answers not discussed until after the Post-test is completed). This type of evaluation may be necessary for credit toward professional accreditation programs.

Before including all of the questions provided for a test, review the questions to ensure that they reflect the objectives and actual content to be delivered. If the ISTC Training Modules were customized, certain questions may no longer be applicable.

Use as an interactive discussion tool:

If not used for testing purposes, evaluation questions may be used in slide format inserted within or at the end of each module to generate participant discussion.

Formats provided:

- Test Questions for all of the modules have been consolidated into one Word document with an Answer Key to assist in delivering the questions in a printable testing format (located in the Facilitator Material folder / Evaluation and Training Tools subfolder).
- Questions can be found in slide format in two places: at the end of each module slide-set and also in a consolidated set of question slides (located in the Facilitator Material folder / Evaluation and Training tools subfolder).

Course Evaluation forms

It is important to evaluate the overall success of training delivered to assess whether the course met curriculum goals and objectives. The results of an evaluation can inform the course developer in ways to improve the course material and delivery, as well as the training environment and circumstances. Evaluation tools included with the ISTC Training Modules include sample templates for the following types of evaluation forms:

- End of course evaluation
- Follow-up (impact) evaluation

(Forms located in the Facilitator Material folder / Evaluation and Training Tools subfolder.)

Sample participant sign-in sheet, name tags, and certificates

Sample forms for participant sign-in, name tags, and course completion certificates are available to adapt to training needs.

(Forms located in the Facilitator Material folder / Evaluation and Training Tools subfolder.)

Tips for Course Development & Facilitation

Sample ISTC Agendas

The ISTC Training Modules are highly adaptable to meet the various educational needs of planners of tuberculosis curriculum and can facilitate the integration of the *ISTC* into training programs.

ISTC Training Modules as full presentations for curricular needs: As examples of possible ISTC Training Courses, we have prepared One-half Day, One-Day, and 2.5-Day training sample agendas. The Facilitator can modify the sample agendas or create new agendas based on the educational needs of the target audience and time schedule.

ISTC Training Modules as a tuberculosis “Training Resource Library”:

Material from the ISTC Training Modules can also be adapted and incorporated into existing curriculum and courses. They may serve as a ready source for specific *ISTC* material, individual slides, images or graphics, as needed to update or augment existing material.

Sample of a One-half Day Agenda: “Basics in Tuberculosis Care”

The *One-half Day Agenda: “Basics in Tuberculosis Care”* covers the basic principles of tuberculosis clinical care, incorporating relevant *ISTC* standards. This agenda could serve as an introductory course for clinicians new to tuberculosis care or as a refresher course to those who would benefit from a basic review.

Example use of ISTC Training Module Test Questions: This sample agenda includes the use of the evaluation Pre- and Post-test questions as a tool for continuing medical education accreditation.

***Case Discussions:** Presentation of cases (not included in the ISTC Training Modules) generated from the local area of training would be highly recommended as an additional educational tool for interactive teaching.

One-half Day Agenda: “Basics in Tuberculosis Care”		
ISTC Training Course (Title) January 2, 2009 (Date) The TB Center (Location)		
TIME:	TOPIC:	INSTRUCTOR:
8:00 – 8:15 am	Course Introduction/Overview and Pre-test	Facilitator
8:15 – 8:30 am	Introduction to the ISTC	Instructor 1
8:30 – 9:30 am	Clinical Presentation and Diagnosis of Tuberculosis	Instructor 2
9:30 – 10:30 am	Initial Treatment of Tuberculosis	Instructor 3
10:30 – 10:40 am	BREAK	Facilitator
10:40 – 11:40 am	Fostering and Assessing Adherence to Treatment	Instructor 4
11:40 – 12:10 pm	Case discussions*	Instructor 5
12:10 – 12:30 pm	Summary / Course Evaluation and Post-test	Facilitator

Sample of a One-Day Agenda: “ISTC Core Topics in Tuberculosis”

The *One-Day Agenda: “ISTC Core Topics in Tuberculosis”* is an abbreviated version of the *2.5-Day Agenda: “Comprehensive Course in Tuberculosis Care”* (described later) offering core topics in more advanced level tuberculosis care. The *One-Day Agenda* should include appropriate breaks and a lunch period to keep participants refreshed and focused. Ideally, a needs assessment should be conducted prior to developing a training course of this type, to allow the creation of an agenda based on identified needs of the target audience.

Example use of ISTC Training Module Test Questions: This sample agenda demonstrates the use of the ISTC Training Module Test Questions (in PowerPoint form) as the basis for interactive discussion sessions.

***Case Discussions:** Presentation of cases (not included in the ISTC Training Modules) generated from the local area of training would be highly recommended as an additional educational tool for interactive teaching.

One-Day Agenda: “ISTC Core Topics in Tuberculosis” (Title) January 2, 2009 (Date) The TB Center (Location)		
TIME:	TOPIC:	INSTRUCTOR:
8:00 – 8:15 am	Course Introduction / Overview	Facilitator
8:15 – 8:30 am	Introduction to the ISTC	Instructor 1
8:30 – 9:30 am	Tuberculosis and HIV Infection: Introduction and Diagnosis	Instructor 2
9:30 – 10:30 am	Tuberculosis and HIV Infection: Treatment	Instructor 3
10:30 – 10:45 am	BREAK	Facilitator
10:45 – 11:30 am	Interactive Questions and Case discussions: TB/HIV*	Instructor 2 or 3
11:30 – 12:30 pm	Contact Evaluation	Facilitator
12:30 – 1:30 pm	LUNCH	Facilitator
1:30 – 2:30 pm	Drug-resistant Tuberculosis	Instructor 5
2:30 – 3:30 pm	Management of Drug-resistant Tuberculosis	Instructor 6
3:30 – 3:45 pm	BREAK	Facilitator
3:45 – 4:30 pm	Interactive Questions and Case discussions: Drug-resistant TB*	Instructor 5 or 6
4:30 – 4:45 pm	Summary / Course Evaluations	Facilitator

Sample of a 2.5-Day Agenda: “ISTC Comprehensive Course in Tuberculosis Care”

Used together, the nine ISTC Training Modules (plus the 15 minute presentation, Introduction to the ISTC), could serve as the basis for a comprehensive course on tuberculosis care that integrates all of the *ISTC*. Each day should include appropriate breaks and lunch periods to keep participants refreshed and focused. In total the training should take about 2.5 days to complete. As suggested for the *One-Day Agenda*, a needs assessment ideally should be conducted prior to the training to allow the creation of an agenda based on identified needs of the target audience.

Example use of ISTC Training Module Test Questions: This sample agenda includes the use of the evaluation Pre- and Post-test questions as a tool for continuing medical education accreditation.

***Case Discussions:** Presentation of cases (not included in the ISTC Training Modules) generated from the local area of training would be highly recommended as an additional educational tool for interactive teaching.

****Suggestions for locally developed material:** In addition to the case discussions, this sample agenda includes topics that could be generated locally that would be useful to cover in a comprehensive course on tuberculosis. This would include the presentation of local epidemiology, health systems and TB control program specifics, as well as an interactive discussion of local challenges to TB care.

2.5-Day Agenda: “ISTC Comprehensive Course in Tuberculosis Care” (Title) January 2, 2009 (Date) The TB Center (Location) DAY ONE		
TIME:	TOPIC: Diagnosis	INSTRUCTOR:
8:00 – 8:30 am	Course Introduction / Overview and Pre-test	Facilitator
8:30 – 8:45 am	Introduction to the ISTC	Instructor 1
8:45 – 9:45 am	Presentation of local epidemiology, health systems & TB control programs**	Instructor 2
9:45 – 10:00 am	BREAK	Facilitator
10:00 – 11:00 am	Clinical presentation and diagnosis of TB	Instructor 3
11:00 – 12:00 pm	Case discussions: TB diagnosis*	Instructor 3
12:00 – 1:00 pm	LUNCH	Facilitator
1:00 – 2:00 pm	Microbiologic Diagnosis of Tuberculosis	Instructor 4
2:00 – 3:00 pm	Initial Treatment of Tuberculosis	Instructor 5
3:00 – 3:15 pm	BREAK	Facilitator
3:15 – 4:15 pm	Case discussions: TB Treatment*	Instructor 5
4:15 – 4:30 pm	Summary / Evaluations Day 1	Facilitator

2.5-Day: “ISTC Comprehensive Course in Tuberculosis Care” (Title) January 3, 2009 (Date) The TB Center (Location) DAY TWO		
TIME:	TOPIC: Treatment	INSTRUCTOR:
8:00 – 8:15 am	Course Overview Day 2, (Questions/answers from Day 1)	Facilitator
8:15 – 9:15 am	Drug-resistant Tuberculosis	Instructor 1
9:15 – 10:15 am	Management of Drug-resistant Tuberculosis	Instructor 2
10:15 – 10:30 am	Break	Facilitator
10:30 – 11:30 am	Case discussions: Drug-resistant TB*	Instructor 1 or 2
12:30 – 1:30 pm	LUNCH	Facilitator
12:30 – 1:30 pm	TB and HIV Infection: Introduction and Diagnosis	Instructor 3
1:30 -- 2:30 pm	TB and HIV Infection: Treatment	Instructor 4
2:30 – 2:45	BREAK	Facilitator
2:45 – 3:45 pm	Case discussions: TB/HIV*	Instructor 3 or 4
3:45 – 4:00 pm	Summary / Evaluations Day 2	Facilitator

2.5-Day: “ISTC Comprehensive Course in Tuberculosis Care” (Title) January 4, 2009 (Date) The TB Center (Location) DAY THREE		
TIME:	TOPIC:	INSTRUCTOR:
8:00 – 8:15 am	Course Overview Day 3, (Questions/answers from Day 2)	Facilitator
8:15 – 9:15 am	Fostering and Assessing Adherence to Treatment	Instructor 1
9:15 – 10:15 am	Contact Evaluation	Instructor 2
10:15 – 10:30 am	BREAK	Facilitator
10:30 – 11:30 am	Discussion session: Local Challenges and Solutions to Comprehensive TB Care**	Instructor 3
11:30 – 12:00 pm	Summary / Final Course Evaluations and Post-test	Facilitator

Course Preparation

Introduction to ISTC Training

It is important for the Facilitator to take time to prepare for the course prior to the training. There are several steps that are described in this section to assist in the preparation process for a successful training. In addition, Facilitation Basics are described later in this Facilitator's Guide to assist the Facilitator while leading the training and engaging participants.

Target Audience (Participants)

The ISTC Training Modules were developed to educate healthcare providers, particularly both public and private physicians, who are involved in the diagnosis, treatment and control of tuberculosis. Selected material is also relevant for different target learner groups, including pre-service trainees, nurses, and health officers. For an optimum learning experience and management of the training, it is suggested to have smaller groups (20 or less) per training. Participants should be notified well in advance of the training. The notification should include training course title, objectives, date, time, location and any other logistical information such as directions and payment.

Recruitment of Instructors

As part of the preparation process for the training, the Facilitator will need to identify, locate, and request the participation of appropriate experts to serve as Instructors. It is essential to receive confirmation from the Instructors several months prior to the training. The number of Instructors necessary for the training depends on the number of modules and topics selected for the training.

Facilities, Equipment, and Materials

To enhance the learning experience and to ease the management of the training, a well-lit distraction-free room should be reserved in advance. The room should be large enough to accommodate participants comfortably. There should be chairs and tables for all the participants. Keep in mind the location of the facility in respect to the distance from the participants' homes and work places.

The room should be equipped with:

- Convenient and accessible outlets
- Laptop computer
- Projection monitor (LCD) compatible with computer
- Extension cords
- Markers
- Flip Chart
- Masking Tape
- Pens and pencils for participants
- Training materials for participants
- Back-up generator (as needed)
- Microphones and speakers (if needed)

Course Preparation Checklist* (1 of 3)

Check when complete	10 – 12 Weeks Before the Training
	<ul style="list-style-type: none"> Adapt course content and number of modules for the course based on needs assessment.
	<ul style="list-style-type: none"> Develop a detailed agenda setting time-frame for course and Instructors.
	<ul style="list-style-type: none"> Develop and/or confirm training budget.
	<ul style="list-style-type: none"> Identify target audience/participants.
	<ul style="list-style-type: none"> Agree on maximum number of participants (20 or less is best).
	<ul style="list-style-type: none"> Identify potential Instructors for ISTC Training Modules.
	<ul style="list-style-type: none"> Send letters of invitation to Instructors.
	<ul style="list-style-type: none"> Review Facilitator's Guide, presentation slides, instructions for Participant Manual, and other training materials.
	<ul style="list-style-type: none"> Determine training facility, equipment, and supplies needed for the training.
	<ul style="list-style-type: none"> Set date, location, and time for training. Verify that the date does not conflict with other major events or holidays. Make sure you have received the confirmation letter from the Instructors.
Check when complete	8 – 10 Weeks Before the Training
	<ul style="list-style-type: none"> Develop training announcement and registration materials.
	<ul style="list-style-type: none"> Mail/email workshop announcement and registration materials to target audience. Announcement should include: intended target audience, course title, course content/agenda, course objectives, date and location, instructions for registering, lodging/travel information (if necessary), and name of contact person. It is helpful to include several demographic questions for the target audience to complete for the Facilitator.
	<ul style="list-style-type: none"> Confirm arrangements for travel and lodging for Instructors if necessary.
	<ul style="list-style-type: none"> Agree on arrangements such as per diem for Instructors.
	<ul style="list-style-type: none"> Send letter of confirmation to the facility where the training is being held.
	<ul style="list-style-type: none"> Order and/or assemble training equipment and supplies.
	<ul style="list-style-type: none"> Provide electronic and paper copies of the assigned modules to the appropriate Instructors for review and preparation.

*Adapted from CDC's "HIV Rapid Test Training"

Course Preparation Checklist (2 of 3)

Check when complete	4 Weeks Before the Training
	<ul style="list-style-type: none"> • Collect all final electronic presentations from Instructors and download onto a computer – make sure formats appear correctly on the screen.
	<ul style="list-style-type: none"> • Reserve audiovisual equipment (check working condition, extra light bulbs, and electrical outlet requirements).
	<ul style="list-style-type: none"> • Obtain flip charts, pointers, felt tip markers, and other training materials as needed.
	<ul style="list-style-type: none"> • Confirm training venue location. Check venue for adequate light, space, seating arrangements, temperature control, handicap access, etc.
	<ul style="list-style-type: none"> • Prepare Pre- and Post-test forms based on the content of final electronic presentations from Instructors (sample Pre- and Post-test questions for each module are provided in the Resources and Tools section).
	<ul style="list-style-type: none"> • Prepare training evaluation based on the number of course days and presentations given (sample evaluations are in the Resources and Tools section).
Check when complete	3 Weeks Before the Training
	<ul style="list-style-type: none"> • Print and collate Participant Manuals using final electronic presentations from Instructors. Print Pre- and Post-tests forms, evaluation forms, agenda, and case studies.
	<ul style="list-style-type: none"> • Confirm the number of registered participants; continue recruitment if there are still available seats.
Check when complete	2 Weeks Before the Training
	<ul style="list-style-type: none"> • Make name tags for participants and Instructors.
	<ul style="list-style-type: none"> • Develop sign-in sheet for participants.
	<ul style="list-style-type: none"> • Develop course completion form or course certificate.
	<ul style="list-style-type: none"> • Confirm equipment reservations for the training date.
	<ul style="list-style-type: none"> • Prepare supplies and training materials.
	<ul style="list-style-type: none"> • Review and rehearse training course welcome, agenda, speaking order of Instructors, breaks, lunches, and participant list.
	<ul style="list-style-type: none"> • Prepare welcome sign and directional signs for the training room.

Course Preparation Checklist (3 of 3)

Check when complete	During the Training
	<p>One hour before start time:</p> <ul style="list-style-type: none"> • Place welcome and directional signs at the facility. • Set up table to register/sign-in participants and distribute name tags, training handouts, Participant Manuals, and course agendas. • Check set-up of room, check equipment, adjust temperature, and check supplies (pens, flip charts etc.).
	<p>At the beginning of the course:</p> <ul style="list-style-type: none"> • Have participants complete the Pre-test questions for the training course and return to Instructor prior to starting the presentation.
	<p>At the end of the course:</p> <ul style="list-style-type: none"> • Have participants complete the Post-test questions for the training course and return to the Facilitator. • Have the participants complete the course evaluation at the end of the training.
Check when complete	Immediately After the Training
	<ul style="list-style-type: none"> • Debrief with Instructors and training staff.
	<ul style="list-style-type: none"> • Send thank you letters to Instructors and other key officials who made the training possible.
	<ul style="list-style-type: none"> • Collect and evaluate Pre- and Post-test forms and evaluation forms.
	<ul style="list-style-type: none"> • Prepare a report of training.
Check when complete	6 – 12 Months After the Training
	<ul style="list-style-type: none"> • Follow up with participants to verify if they were able to apply knowledge and skills obtained during the training, six months after the training and again at 12 months after the training. (A sample of the Questionnaire can be found in the Resources and Tools section.)

Facilitation Basics

(Adapted from WHO's "Facilitator's Guide: Managing TB at the Raion Level")

Introduction to a Facilitator

In your assignment to conduct and manage the course, you are a Facilitator. The role of the Facilitator is quite different from that of an Instructor. A Facilitator is a person who ensures an optimal learning environment for participants.

As a Facilitator, you need to be very familiar with the material being taught. It is your job to give explanations, do demonstrations, answer questions, talk with participants about their answers to exercises, lead group and case study discussions, and generally give participants any help they need to learn according to the training objectives.

Roles of a Facilitator

As a Facilitator, you will perform three important tasks:

1. You will INSTRUCT

- Introduce the training, instructors, and the training course schedule
- Discuss "house-keeping" items such as the course format, when the breaks occur, and where the rest rooms are located
- Make sure each participant has all course material including agenda, Participant Manual, pens, and Pre- and Post-tests when applicable
- Answer the participants' questions
- Make clear any information that the participants find confusing and direct them to available resources
- Guide group activities, such as case-studies and group discussions, in order to make sure that the learning objectives are accomplished
- Identify problem areas in participants' understanding and skills, and provide clarity when needed. Also, if a participant has difficulty with the language used, make sure he/she receives the help needed to understand the concepts
- Help the participants understand how to apply the skills taught in the course by applying the information to practical problems and actual situations found in their work settings
- Lead group discussions and question and answer sessions after presentations to reinforce and clarify material
- Ask questions to spark discussion. Use open-ended questions to get participants to share information and experience. (Open-ended questions are questions that require more than a "yes" or "no" answer)
- When you ask a question, pause long enough to give participants a chance to respond

2. You will **MOTIVATE**

- Demonstrate enthusiasm for the topics covered in the course and for class participation
- Compliment each participant for answering questions, sharing individual experiences, and participating in group discussions
- Encourage participants to explore how the topics apply to their work activities and how the skills will help them improve their practice of TB care and control

3. You will **MANAGE**

- Make sure you are prepared and that participants have access to the correct supplies and materials when they need them. Be sure to always have extra materials available
- Make sure there are no other major obstacles to learning (such as too much noise, not enough light, or not enough work space)
- Monitor the involvement and level of understanding of the participants
- Monitor the timing and pace of the course. Attempt to stay on schedule and ensure adequate breaks

Facilitation Techniques

- **Show enthusiasm** for the topics covered in the course and for input from the participants
- **Be attentive** to each participant's questions and needs. Encourage the participants to come to you at any time with questions or comments. Be available during breaks and after the course for additional questions
- **Observe the participants** and offer individual help if you see a participant looking troubled, staring into space, not writing answers, or not turning pages. These are clues that the participant may need help
- **Promote a friendly and cooperative relationship.** Respond positively to questions (by saying, for example, "Yes, I see what you mean," or "That is a good question"). Listen to the questions and try to address the participant's concerns, rather than rapidly giving the "correct" answer
- **Always take enough time** with each participant to answer his/her questions completely (that is, so that both you and the participant are satisfied)

Avoid Facilitation Pitfalls

- **During times scheduled for course activities, do not work on other projects** or discuss matters not related to the course
- **In discussions with participants, avoid** using facial expressions or making comments that could cause participants to feel embarrassed
- **Avoid being too much of a showman or performer.** Enthusiasm (and keeping the participants awake) is great, but learning is most important. Keep watching to ensure that participants understand the materials. Difficult points may require you to slow down and work carefully with individuals

- **Do not be condescending.** In other words, do not treat participants as if they are children. They are adults
- **Do not talk too much.** Encourage the participants to talk
- **Do not be shy,** nervous, or worried about what to say

Group Discussion Guidelines

- **Plan to conduct a group discussion** at the end of each training module presentation. Be prepared for questions and discussions that may arise during the presentations. Help the Instructors field questions and decide whether to answer the questions at that moment or to postpone discussion until the allotted time at the end of the module
- **Before beginning the discussion, refer to the appropriate notes** in the ISTC Training Modules and Facilitator's Guide to remind yourself of the purpose of the discussion and the main learning objectives of that ISTC Training Module
- **Begin the group discussion** by telling the participants the purpose of the discussion
- **Be sure that the conclusions of the group are reasonable** and that all participants understand how the conclusions were reached. Often there is no single correct answer that needs to be agreed on in a discussion
- **Try to get most of the participants involved in the discussion.** Record key ideas on a flipchart as they are offered. Keep your participation to a minimum, but ask questions to keep the discussion active and on track
- **Always summarize** or ask a participant to summarize what was discussed in the exercise. Give participants a copy of the answer sheet, if one is provided
- **Reinforce the participants** for their good work by (for example):
 - Praising them for the list they compiled
 - Commenting on their understanding of the exercise
 - Commenting on their creative or useful suggestions for using the skills in the work setting
 - Praising them for their ability to work together as a group

References

The following documents were adapted in the production of these materials:

- “Facilitator’s Guide: Managing TB at the Raion Level,” WHO;
http://www.who.int/tb/publications/who_cds_2002_310/en/
- “HIV Rapid Test Training,” CDC;
<http://www.cdc.gov/hiv/topics/testing/rapid/rt-training.htm#Main>
- “Clinical Mentoring Toolkit,” International Training & Education Center on HIV (I-TECH);
<http://www.go2itech.org/itech?page=db-cmtoolkit>