CHECKLIST FOR IMPLEMENTATION STEPS AND ACTIVITIES

This checklist is provided to give you a quick overview of the steps and activities you will undertake to implement your LTBI treatment program and to provide a convenient means of tracking your progress.

PROGRAM PLANNING

STEP 1. CONDUCT A LOCAL SITUATIONAL ANALYSIS ON WHICH TO BASE YOUR PLANNING

___ 1-A. Identify which groups in your jurisdiction have the highest risk for LTBI and TB disease, based on local epidemiological trends.

___ 1-B. Develop a community profile that describes your target groups in detail.

___ 1-C. Assess your organization’s existing capacity and resources for implementing an LTBI program.

STEP 2. REVIEW RELEVANT GUIDELINES, PROTOCOLS, AND STRATEGIES FOR LTBI TREATMENT

___ 2-A. Review ATS/CDC guidelines for targeted testing and treatment of LTBI.

___ 2-B. Review your local LTBI treatment protocol or establish such a protocol if one is not currently in place.
___ 2-C. Examine strategies, case studies, and information from this Toolbox and other sources to determine the approaches most applicable to your community and situation.

STEP 3. DESIGN THE FRAMEWORK FOR YOUR LTBI PROGRAM

___ 3-A. Determine who should be involved in the development of the program framework and invite their participation.

___ 3-B. Set up a process for considering questions and issues, making decisions, and achieving consensus.

___ 3-C. Develop the framework for your LTBI program: purpose or mission, target populations, goals or desired outcomes, and program strategies.

___ 3-D. Document and distribute the agreed-upon program framework.

STEP 4. DEVELOP A PROGRAM BUDGET AND IDENTIFY SOURCES FOR PROGRAM FUNDING

___ 4-A. Develop a preliminary financial plan and budget.

___ 4-B. Develop a list of prospective sources for the additional necessary funding and obtain application information.

___ 4-C. Develop and submit funding proposals.

___ 4-D. Set up financial management systems.

STEP 5. DEVELOP AN ACTION PLAN FOR IMPLEMENTATION OF THE PROGRAM

___ 5-A. Assign a staff person to be in charge of the implementation process.
___ 5-B. Design or adopt a checklist or action plan outline to use as a planning tool.

___ 5-C. Distribute the action plan to everyone who is responsible for activities or tasks and to other stakeholders as appropriate.

___ 5-D. Review and update the action plan regularly.

COMMUNITY AND PATIENT RELATIONS

STEP 6. ESTABLISH COLLABORATIONS WITH COMMUNITY PARTNERS

___ 6-A. Assess what you need and expect from community partners and what your organization can offer in establishing mutually beneficial collaborations.

___ 6-B. Identify prospective partners and assess the potential benefits and drawbacks of collaborating with each one.

___ 6-C. Contact prospective partners to propose the collaboration and explain the LTBI program: its purpose, importance, and objectives.

___ 6-D. Discuss and agree upon:

• The scope of services to be offered
• Anticipated costs and how they will be allocated among the partners
• Each partner’s roles, responsibilities, and expectations
• The standards by which the partners will evaluate their collaboration
___ 6-E. Negotiate and execute a Memorandum of Understanding (MOU) with each partnering organization to document the terms of your agreement.

STEP 7. PLAN YOUR COMMUNITY OUTREACH STRATEGIES

___ 7-A. Research outreach strategies that have been demonstrated to be effective in reaching your target groups.

___ 7-B. Explore possible ways that you might collaborate with community partners on your outreach efforts.

___ 7-C. Develop an outreach action plan.

STEP 8. ASSESS AND ACQUIRE WHAT YOU NEED TO PROVIDE CULTURALLY APPROPRIATE CARE

___ 8-A. Identify your internal resources (i.e., bilingual staff) for communicating and working appropriately with members of the cultural, ethnic, and linguistic groups to which high-risk individuals in your jurisdiction typically belong.

___ 8-B. Identify external resources that you might draw upon.

___ 8-C. Arrange with the identified resources to obtain services and acquire materials that will help your program work effectively with the populations it serves.

STEP 9. PROVIDE FOR INCENTIVES AND ENABLERS

___ 9-A. Research possible incentives and enablers that would meet the needs of your target groups.

___ 9-B. Decide on an initial menu of incentives and enablers.
___ 9-C. Identify sources for the selected incentives and enablers and make the necessary arrangements to have them available for distribution.

___ 9-D. Establish guidelines and procedures for the disbursement of incentives and enablers.

___ 9-E. Set up referral mechanisms to link patients with programs, goods, or services that your program cannot provide.

___ 9-F. Plan for regular evaluation of your incentives and enablers.

SERVICE DELIVERY

STEP 10. PLAN THE LOCATION WHERE YOU WILL DELIVER SERVICES

___ 10-A. Decide where your services should be located by determining the neighborhoods and areas your target patients are most likely to reside, work, or visit.

___ 10-B. Assess your program to determine your space needs and how you will reconcile them with your budget.

___ 10-C. Decide on the space option that makes the most sense for your program: single stationary location, multiple locations, mobile unit, or space shared with community partners.

___ 10-D. Make the necessary arrangements to establish the terms and conditions of your use of the selected space.

___ 10-E. Design a site plan.
___ 10-F. Determine what furnishings and equipment will be needed and develop an acquisition plan.

___ 10-G. Engage suppliers to accomplish any work that needs to be done to make the space suitable for your program’s use.

___ 10-H. Arrange for your move into the completed space.

STEP 11. DEVELOP ADMINISTRATIVE PROTOCOLS

___ 11-A. Review available models for administrative procedures.

___ 11-B. Determine what modifications are needed to fit the models to your program.

___ 11-C. Develop and document the specific administrative protocols that your program will use.

___ 11-D. Distribute the completed protocols to staff.

STEP 12. DEVELOP CLINICAL PROTOCOLS

___ 12-A. Review available models for clinical procedures.

___ 12-B. Determine what modifications are needed to adapt the models to your program.

___ 12-C. Develop and document the specific clinical protocols that your program will use.

___ 12-D. Distribute the completed protocols to appropriate providers and staff members and provide training as necessary.
STEP 13. IDENTIFY AND PROVIDE FOR STAFFING NEEDS

___ 13-A. Assess the staffing requirements of your LTBI program.

___ 13-B. Develop or modify job descriptions to incorporate the LTBI treatment program responsibilities.

___ 13-C. Determine what resources will be required for the staff (office space, telephone, equipment, etc.).

___ 13-D. If new staff will be hired, develop and implement a recruitment action plan.

STEP 14. TRAIN STAFF TO IMPLEMENT THE LTBI PROGRAM

___ 14-A. Identify the training needs of your staff with regard to the LTBI program.

___ 14-B. Create an action plan for conducting the training.

___ 14-C. Set up a training schedule and handle necessary logistical arrangements.

___ 14-D. Conduct the training program.
STEP 15. DEVELOP TOOLS AND PROCEDURES FOR CONDUCTING REGULAR PROGRAM EVALUATIONS

___ 15-A. Determine which measures, standards, and outcomes you will use to evaluate your LTBI program.

___ 15-B. Develop and document procedures for conducting the evaluation and for collecting, analyzing, and reporting the data that will be used.

___ 15-C. Set up a schedule for regular program evaluations.

___ 15-D. Conduct the scheduled evaluations and assess the results.