INTRODUCTION: TB CONTROL TOOLBOXES

The TB Control Toolboxes have been developed to help TB control programs take advantage of tested strategies and innovations. The Model TB Centers and other organizations have developed a number of successful approaches, but TB control program staff have not always found it easy to access or implement them. The Toolboxes move beyond traditional methods of disseminating information, documenting these models in a flexible CD-ROM format that makes the tools and components easy to adapt and use.

To create the Toolboxes, we have drawn upon the “best practices” of a cross-section of TB control programs. Different programs have different resource environments and approaches to TB control and this is reflected in the variety of models and tools that are included.

WHAT ARE THE PURPOSES OF THE TB CONTROL TOOLBOXES?

The purposes of the Toolboxes are to:

• Identify the essential components of innovative TB control activities so that TB control programs can choose the ones they need, and replicate or modify them

• Provide easy-to-use, step-by-step guides for implementation along with sample forms and templates that TB control programs can adopt or revise

• Enable TB control programs to customize programs to fit their specific needs or circumstances
WHAT DOES A TOOLBOX CONTAIN?

Each Toolbox offers a how-to guide regarding a particular program or strategy related to TB control. It provides information on the purpose and importance of the program, describes the characteristics of a successful model, gives step-by-step guidance on implementation, and offers a variety of tools and materials that you can adapt for your own use. The Toolbox contents are contained in three main folders located on the left side of your computer screen:

FOLDER 1: INTRODUCTION

This folder provides information that will help you navigate this CD and access the information you need. The documents included are:

What is a TB Control Toolbox? An overview of the purpose and contents of the Toolboxes. (This is the document you are currently reading.)

Overview of this Toolbox. A description of the individual Toolbox, including its purpose, target audience, information about rights and permissions, references, and acknowledgements. For ease of reading, we have not included footnotes in the text—you can learn here about the individuals, organizations, and written materials that provided information for the Toolbox.

Using the CD-ROM. Technical support for Toolbox users, including instructions for editing, saving, and printing files.

FOLDER 2: TEXT

This folder contains documents that describe the program and its implementation. They are presented in PDF format and can be downloaded to your hard drive (please see Using the CD-ROM). These items may vary from Toolbox to Toolbox, according to the type and purpose of the program being presented. In general you will find:
**Essential Elements.** A description of the program, discussing its purpose and importance, and a summary of the elements that are essential for a successful program, including program components, strategies, staffing, and resources.

**Step-by-Step Implementation Guide.** A clear, precise, and detailed guide that explains all the steps you need to follow to implement a successful program. Also may include an Action Plan to help you plan and organize this implementation.

**Background Materials.** Background Guides that provide a more in-depth discussion of particular strategies and components that are important to the program.

**Resources for Further Information.** Supplemental materials such as bibliographies, websites, articles, or case studies of how the program operates in particular jurisdictions.

**FOLDER 3: TOOLS**

This folder contains forms, letters, charts, policies, protocols, reference materials, checklists, and other tools that illustrate the implementation steps and will assist you in carrying them out. Some are samples of materials used by TB control programs; others are templates developed for this Toolbox. Most of them are presented in word-processing formats. You can download these items and modify them to suit your own program.

**HOW DO YOU USE A TOOLBOX?**

The modular design of the Toolboxes makes them flexible and easy to use. With this format, several people can work with various Toolbox components at the same time.
You can readily locate the items that are relevant to your situation and organize them in the way you find most functional. Using the Toolboxes, you can:

- Review and benefit from the successes of programs created by other TB-related organizations
- Develop and implement your own program, based on the Toolbox model
- Adopt individual program components or adapt them to fit your circumstances
- Create a library of forms and documents that will help you run your program effectively
- Enhance your staff training about the program, its objectives, and its effective operation

**WHERE CAN YOU OBTAIN MORE INFORMATION?**

The TB Control Toolboxes are a collaborative project of the San Francisco TB Control Program and the Francis J. Curry National Tuberculosis Center. For further information, including a list of available Toolboxes, please contact:

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DEVELOPING, PRESENTING, AND EVALUATING A TB TRAINING PROGRAM: AN OVERVIEW

Training and education for healthcare services are fundamentally important strategies for the control and eventual elimination of tuberculosis (TB). Worldwide, the TB epidemic is a major health crisis and, while the incidence of TB is lower in the U.S. than in many countries, this nation faces many challenges related to the disease. Yet many healthcare policy-makers, medical workers, and social service providers know little about TB.

When TB is not well understood by healthcare professionals, the chances increase that patients will be misdiagnosed or will fail to receive adequate or appropriate treatment. This in turn increases the risk that TB can spread in a community. Effective TB training and education, therefore, is a vital tool for protecting the health of individuals and the public.

Despite many new approaches to education (distance learning, self-study programs, and other innovative technologies), a training course that brings participants together to learn from experts in the field and from each other remains one of the most effective ways for people to gain information and enhance their skills.

This TB Control Toolbox has been developed to assist TB control programs in developing and presenting effective TB training sessions. It provides clear, concise information on planning a training course and coordinating the myriad tasks, small and large, which must be accomplished to produce it. The Toolbox is designed to meet the needs of experienced programs that are seeking to improve the organization of their TB training efforts as well as programs that are considering TB training for the first time. The Toolbox can also help those who are applying for funds to present a concise budget and a training plan to potential funders.
WHY IS TB TRAINING IMPORTANT?

Once a leading cause of death in the U.S., TB began to diminish as a public health threat in the decades following World War II. TB rates and cases declined due to improvements in living conditions and the development of effective anti-tuberculosis drugs. Many healthcare providers, policy makers, and the public perceived TB in the U.S. to be under control. Much of the public health infrastructure that dealt with the disease was dismantled and resources that had been allocated for TB prevention and control were redirected to other needs.

But in the mid-1980s, due in part to the rise of HIV/AIDS, TB came back with a vengeance. The number of cases surged by 20 percent from 1985 to 1992. In response, the federal government and local jurisdictions mobilized to bring TB back under control. Additional public health workers were hired and trained, TB clinics and laboratories were improved, and capabilities were strengthened for TB surveillance, treatment, patient follow-up, contact investigation, and screening and treatment of latent infection (LTBI). This increase in interest and resources had positive results: after peaking in 1992, TB rates began to decline.

Despite these gains, TB remains a serious public health concern for a number of reasons:

• TB is endemic in many countries; worldwide it is the leading cause of death due to a single infectious agent—despite being a treatable and preventable condition. Though the picture is far brighter in the U.S., the constant movement of people around the world ensures that TB does not respect borders

• An increasing proportion of TB cases in this country is occurring among individuals who are foreign-born or who are disadvantaged because of poverty, substance abuse problems, HIV infection, incarceration, or
homelessness. Persons in these populations frequently have trouble gaining access to healthcare services or completing a required course of therapy—problems that can compound the difficulty of managing TB cases.

- Multidrug-resistant strains of *Mycobacterium tuberculosis* have emerged, greatly complicating effective treatment and control.

- Healthcare infrastructure underwent significant changes during the 1990s, as private-sector managed care organizations (MCOs) grew in size, stature, and influence. Traditionally and legally, state and local health departments are responsible for TB treatment and control but MCOs are increasingly being called upon to provide care and services to persons who have or are at risk for TB. This circumstance calls for strong alliances and a sharing of expertise between private-sector and public-sector organizations.

- As a result of the successful eradication efforts of the 1990s, TB funding has leveled off. Unfortunately, many healthcare providers and policy-makers no longer view TB control as critical or urgent.

Without vigilance and sustained effort, it is likely that the progress made in the 1990s could be reversed and that rates of TB cases and deaths could climb again. Accurate and up-to-date knowledge about TB is one of the most powerful tools we have in the struggle to combat this disease and its spread.

In 1989, the CDC/Department of Health and Human Services’ Advisory Committee (now Council) for Elimination of Tuberculosis (ACET) published *A Strategic Plan for the Elimination of Tuberculosis for the U.S.*. This document charged all TB control programs with the mission to eliminate the disease in the U.S. by the year 2010 and set out strategies for accomplishing that aim. One of the primary strategies for meeting this goal is educating healthcare providers about TB.
WHO NEEDS TB TRAINING?

In order for TB control efforts to be successful, people who work in a variety of professional capacities need to be involved with and knowledgeable about TB. These include persons whose work brings them in contact with individuals who have or are at risk for TB infection or disease as well as those who, through their decision-making roles, are in a position to influence TB control or care. Topics for training sessions can range from the clinical and epidemiological side of TB control to the sociological and public health standpoints. Persons who may be part of likely target audiences for TB training include:

• Healthcare providers (in both the public and private sectors) who are involved in direct services to patients, including physicians (primary care and specialists), nurse practitioners, physician assistants, nurses, respiratory therapists, emergency room personnel, and laboratory workers

• Managers, administrators, and medical directors who have an indirect influence on patient care services, including decision-makers at private and public hospitals, public health agencies, large multi-specialty group practices, managed care organizations, and insurance plans

• Public health workers in nonclinical positions, such as case managers, disease control investigators, outreach workers, health educators, surveillance specialists, TB case registry staff, and military staff

• Social services workers or clergy who work with populations at high risk for TB infection and disease, such as immigrants or refugees, migrant workers, homeless individuals, persons with HIV, persons with substance abuse problems, or inmates of correctional facilities

• Government and community decision-makers who have the ability to influence funding and policy for health issues, including TB control
WHAT ARE THE HALLMARKS OF AN EFFECTIVE TB TRAINING PROGRAM?

It addresses the needs of its audience. The audiences for TB training are diverse in many ways—in terms of their educational and cultural backgrounds, the type of agency or organization that employs them, and the professional role they play in TB treatment and control. An effective TB training program is tailored to the educational needs of its participants, their existing level of knowledge, and the ways in which they will apply the information and skills after the training has been completed. Curricula and training materials should be targeted very specifically to the concerns and roles of the particular audience, taking into account:

- The roles and responsibilities of the audience members
- Their education level
- The type of setting in which they work
- The type of jurisdiction or community in which they work (i.e., whether it is an urban, suburban, or rural area; whether it has a high or low incidence of TB)
- The population with whom they work—the general public, medically indigent or underserved communities, high risk groups, etc.

It is culturally appropriate. The content, presentation format, and materials should be consistent with the culture, values, and language of the participants and the populations with whom they work.

It is part of a regular and consistent program. TB training should not be a one-time effort but must be a continuing endeavor. Turnover in personnel means that most organizations have ongoing training needs. Moreover, effective training for any individual involves regular follow-up, reinforcement, updating of information, and enhancement of skills and resources.
It is carefully planned and well presented. Producing a good training event requires both big picture and small picture thinking. On the one hand, it requires you to clearly define your goals and desired results, develop systems for achieving them, and maintain a clear focus on these ends. On the other hand, it demands that you pay close attention to many small details. When glitches occur or the logistics of the event have not been well planned, participants can become distracted and dissatisfied. But when the training is well organized and executed, the participants are free to concentrate on their learning and the event will meet the course objectives.

WHAT TRAINING RESOURCES ARE AVAILABLE?

Many excellent TB training resources are available, including Model Center programs and curricula (like this); publications such as manuals, handbooks, reports, journals, newsletters, booklets, brochures, and handouts; and distance learning products and activities including audiotapes, videotapes, compact disks and DVDs, health-based websites, and online courses. These have been developed by a variety of organizations and are designed to address the interests and needs of a wide range of audiences. For more, see the Resources for Further Information section for helpful referral information located in the Background Materials section of this toolbox.
ESSENTIAL ELEMENTS OF AN EFFECTIVE TB TRAINING PROGRAM

How do you plan and conduct an effective TB training program? This section sets forth the ingredients for a successful training. It also describes the staffing and other resources needed. The Step-by-Step Implementation Guide in the next section gives a comprehensive plan for putting these essential elements in place.

WHAT ARE THE COMPONENTS OF A SUCCESSFUL TRAINING PROGRAM?

The planning and production of a training program is not a single step-by-step procedure. Rather, it involves a series of activities that are implemented more or less concurrently, beginning with the planning stage, running through the training session itself, and concluding with follow-up activities (e.g., short- and long-term evaluation) after the training is over. Francis J. Curry National TB Center has identified fifteen distinct components of training—the basic strategies, systems, and procedures that are essential to a well-run and effective training event. You might think of these fifteen components as modules that you can link together to construct a successful training event. They can be grouped into five broad categories:

- **Planning:** (1) Needs assessment, (2) choice or development of curriculum, (3) creation of an action plan, (4) budget development, (5) selection of the training location
- **Course development:** (6) Recruitment and coordination of faculty, (7) development of training materials, (8) arrangement for continuing education credits
- **Participants:** (9) Marketing to attract the target audience, (10) registration
• Logistics: (11) Space set-up, (12) audiovisual arrangements, (13) catering, (14) staff coverage

• Post-course follow-up: (15) Evaluation

Each module forms the basis for one of the steps in the Step-by-Step Implementation Guide.

WHAT ARE THE STAFFING REQUIREMENTS?

The staff you will need depends on the size and scope of your training program. A single individual might be able to coordinate a half-day event on your own premises with a small audience and only one or two presenters. A multiple-day, off-site program with many participants and a large faculty will require the combined efforts of several people. A typical staff (if resources allow) may include:

• A health educator/manager to help customize the curriculum to the needs of the audience
• A coordinator to organize and supervise the planning and production
• One or more assistants, working under the coordinator’s direction, to help with the many multifaceted tasks of putting on a training program
• Additional individuals on the day of the training to run the registration table, distribute materials, assist with audiovisual presentations, coordinate with site personnel, and handle other tasks as needed to ensure that the training runs smoothly

In smaller health departments or jurisdictions, these tasks may be performed by two or fewer staff members.
WHAT RESOURCES WILL YOU NEED?

A successful training program can involve a substantial commitment of time, staff, and financial resources. Precisely what is required will vary substantially, however, depending on many factors, including (but not limited to):

- The duration of the program (a half day, a full day, multiple days)
- The number of faculty, the amount of their honoraria (if any), and the cost of their travel arrangements
- The number of participants who will attend
- The volume of training materials that will be produced
- The type (and cost) of location where the training will be held (conference room, rented hall, hotel meeting room, etc.)
- The type and amount of space to be used
- The vendor services that will be needed (A/V, catering, interpretation, etc.)

Because there are so many factors to be considered and so many types of expenses that can be incurred, careful planning and tracking of the program budget is a must.

In some instances, you may decide to charge a fee for the training, although this is not always feasible or desirable. If a fee is charged, some of the financial resources expended can be recouped, making the training more cost-effective.
Planning and producing a TB training program is not a single procedure but involves several steps. This Implementation Guide is intended to help you organize and carry out the many activities that are involved. Each of the implementation steps comprises one of the fifteen modules or components of a successful training event, as described in the Essential Elements section of this Toolbox and summarized in Table A of this section.

Many of the steps must be accomplished more or less concurrently. The activities begin early in the planning stage and continue through the day of training and afterward, until the event’s follow-up activities have been completed. For each step, or module, you will find a description followed by a listing of the activities involved in accomplishing that step. The activities are labeled according to when they take place: pre-course tasks, day-of-event tasks, and post-course tasks. Note that for a number of steps, all activities are completed prior to the start of the event.

Allow at least three months for accomplishing the pre-course tasks. If you will be conducting a needs assessment (see Step 1: Needs Assessment) as a basis for your planning, it should be completed before the start of the three-month timeframe. More time also may be required if you will be using an off-site facility, since many venues must be booked many months in advance. To help you coordinate your efforts effectively, two checklists, are provided in the checklist section of this toolbox, one is organized according to the steps (the TB Training Program Action Plan), and the other chronologically, (the Training Program Checklist).

Since every training curricula, sponsoring organization, and audience has its own set of needs and expectations, the steps are designed to be flexible and adaptable. Each
step is important, however, and should be addressed as you design and implement your training program.
### TABLE A: COMPONENTS OF A SUCCESSFUL TB TRAINING PROGRAM

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>STEP OR MODULE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PLANNING</strong></td>
<td>Step 1. NEEDS ASSESSMENT</td>
<td>Determine what training needs you want to address.</td>
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<td></td>
<td>Step 2. ACTION PLAN/CHECKLIST</td>
<td>Create an action plan/checklist for developing and conducting the training.</td>
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<td></td>
<td>Step 3. CURRICULUM</td>
<td>Select or develop a course with a format and content that will meet training needs or audience.</td>
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<td>Step 4. BUDGET</td>
<td>Establish a budget and systems for expenditures and tracking costs.</td>
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<td></td>
<td>Step 5. LOCATION/SITE</td>
<td>Secure a suitable location for the training site.</td>
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<tr>
<td><strong>COURSE DEVELOPMENT</strong></td>
<td>Step 6. FACULTY</td>
<td>Recruit faculty and work with them to ensure a successful training course.</td>
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<td>Step 7. COURSE MATERIALS</td>
<td>Develop and produce written materials to support and reinforce training.</td>
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<td>Step 8. CONTINUING EDUCATION</td>
<td>Arrange for the awarding of continuing education credits.</td>
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<tr>
<td><strong>PARTICIPANTS</strong></td>
<td>Step 9. MARKETING</td>
<td>Conduct marketing activities to inform and attract the target audience.</td>
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<td>Step 10. REGISTRATION</td>
<td>Set up a participant registration system and keep updated, as needed.</td>
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<tr>
<td><strong>LOGISTICS</strong></td>
<td>Step 11. SPACE SET-UP</td>
<td>Arrange for the configuration of the meeting room and auxiliary spaces.</td>
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<td></td>
<td>Step 12. AUDIOVISUAL</td>
<td>Arrange for audiovisual materials, equipment, and services to enhance the training presentations.</td>
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<td></td>
<td>Step 13. CATERING</td>
<td>Make provisions for the food and beverage services.</td>
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<td></td>
<td>Step 14. STAFF COVERAGE</td>
<td>Provide staff coverage to handle day-of-event tasks.</td>
</tr>
<tr>
<td><strong>POST-COURSE FOLLOW-UP</strong></td>
<td>Step 15. EVALUATION</td>
<td>Develop evaluation materials to determine if course has met all objectives. Summarize the participants’ evaluations of the training event.</td>
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</table>
STEP 1. DETERMINE TRAINING NEEDS

An effective TB training program is one that focuses directly on what its particular audience must know and do in order to contribute to TB control efforts. The planning begins with an assessment of what the jurisdiction and staff need with regard to TB-related skills and information, what the current epidemiological situation is, what resources are available, and where gaps exist in staff skills and knowledge. The needs can differ greatly from one locality to another, depending on such factors as:

- The overall level of incidence of TB infection and disease
- The ethnic, cultural, and social characteristics of local at-risk or high-incidence populations
- How much experience local healthcare and social services professionals have had in working with TB patients and individuals who are at risk of infection or disease. (Their experience level most likely will vary according to their job categories and the type of settings in which they work)
- Specific skills that your program staff need to improve (according to the findings of needs assessment activities)

It is important to conduct a formal needs assessment—communicating with the program’s staff and clients and reviewing epidemiological data to gather information and suggestions that can be used to guide planning. The most commonly used approach is a written survey, which can be conducted by mail or electronically via email. Focus groups and one-on-one interviews (possibly by telephone) with key informants can also be of considerable value. Local professional associations, healthcare organizations, and social services organizations can help you identify prospective participants.

When designing a written survey form (see associated tool #5 Needs Assessment Survey), keep in mind two objectives: (1) it should encourage recipients to respond, and (2) it should allow for easy tabulation and analysis of the results. Keep the questions direct and brief. Where possible, offer choices and use checkboxes to permit
answers to be marked quickly. Allow space for respondents to make additional comments, and encourage them to do so.

**PRE-COURSE TASKS**

**ACTIVITY 1-A**  
Collect clinical, epidemiological, and sociological data regarding TB in your jurisdiction to use as a guide for needs assessment activities.

**ACTIVITY 1-B**  
Decide if a formal needs assessment will be helpful and, if so, what approach will be used—print survey, electronic survey, focus groups, key informant interviews, or a combination of these approaches.

**ACTIVITY 1-C**  
Develop a survey form or questionnaire that can be completed by survey respondents or used to guide the discussion in focus groups or interviews.

**Associated Tool #5 Needs Assessment Survey**  
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 1-D**  
Compile a list of individuals or groups whose responses will be solicited; that is, who will be asked to complete the questionnaire or participate in the focus groups or interviews.

**ACTIVITY 1-E**  
Determine how the written survey will be distributed (U.S. mail, e-mail, fax), the due date by which it should be returned, and a method for follow-up. If using regular mail, set a due date that allows for time in the mail each way. Including a return envelope will increase the return rate. Providing a fax number for responses is also helpful.
ACTIVITY 1-F
Arrange times and places for focus groups if any will be held.

ACTIVITY 1-G
Draft a cover letter (for the written survey) and invitation letters (for focus groups and interviews) to explain the purpose and importance of the needs assessment and solicit the recipient’s participation.

ACTIVITY 1-H
Distribute the written survey by the means you have selected and, if appropriate, make it available on your organization’s website.

ACTIVITY 1-I
Contact focus group invitees by phone to confirm their participation, and schedule interviews with key informants.

ACTIVITY 1-J
Conduct focus groups and interviews.

ACTIVITY 1-K
Tabulate, analyze, and document the survey responses and information from the focus groups and interviews. Once results are available, they should be shared with program staff (especially those who helped with the needs assessment).

Associated Tool #6 Needs Assessment Survey Summary
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 1-L
Use the results to set priorities and determine which needs should be addressed in your training event.
STEP 2. CREATE AN ACTION PLAN OR CHECKLIST FOR DEVELOPING AND CONDUCTING THE TRAINING

Careful planning from the beginning can save you tremendous effort in the long run. A well-crafted action plan allows you to:

• Clarify your vision and goals for the training program
• Achieve consensus among the persons involved
• Establish realistic budgets and a sound structure for managing the project
• Identify strategies by which your objectives can be accomplished
• Define the many tasks involved in putting on a training program
• Assign and delineate duties and responsibilities

Checklist. A helpful way to document your action plan is in the form of a written checklist. This will prove to be an invaluable tool. Setup in the form of a chart or matrix, the checklist indicates:

• The task or activity to be accomplished
• The person responsible
• The date when the task will begin
• The due date or deadline
• The actual date of completion (if deadline is missed or if activity is completed early)

The checklist functions as a running tally of tasks completed. It allows you to record and review your progress and prevents important elements from being overlooked. One logical way to organize the checklist is to use the steps and activities described in this Toolbox and order them to fit your needs and to meet your scheduled deadlines.
Timeline. The checklist also incorporates the project timeline, establishing a feasible schedule for producing the training. As a rule, the timeline should begin at least three months prior to the course. Once the date for the course is set, calculate backward from that date, or the first day of a multi-day training, to establish start dates and due dates for the pre-course activities. In planning the timeline, consider:

- Weekends, vacation schedules, holiday periods, and other possible sources of delay
- Existing schedules and commitments of your staff and faculty members
- Capabilities and requirements of printers and other vendors (consult key vendors in advance)

Calendar. Another useful planning and reference tool is a master calendar that records due dates for tasks in all categories. Essentially, the calendar is a version of the checklist organized by date rather than according to the steps or modules. By showing at a glance which tasks should be completed by a certain date, the calendar can help keep everyone on track.

Distribution. The checklist and/or calendar should be distributed before the first due date. Everyone whose name appears on the checklist as a person responsible for an activity should receive a copy.

**PRE-COURSE TASKS**

**ACTIVITY 2-A**
Select a date for the training.

**ACTIVITY 2-B**
Design or adapt a checklist or action plan framework to use as a planning tool. Include all of the activities and tasks to be accomplished prior to the course, on the day(s) of the training, and after the course is over.
Associated Tool #1: Training Program Checklist  
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #2: Preliminary Course Checklist  
(Source: Florida Department of Health)

Associated Tool #3: Preliminary Course Checklist  
(short version)  
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #4: Co-Sponsored Course Checklist  
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 2-C  
Determine who will be accountable for accomplishing each of the activities or tasks involved in putting on the training and enter the names on the checklist.

ACTIVITY 2-D  
Working backward from the first day of the training, develop a timeline with start dates and due dates for each activity. Enter the dates on the checklist.

ACTIVITY 2-E  
Create a master calendar, organized by date, that shows the due dates for tasks in all categories.

ACTIVITY 2-F  
Distribute the checklist and calendar to everyone who is responsible for one or more of the included activities or tasks.

ACTIVITY 2-G  
Update the checklist and calendar throughout the training production period to reflect completed activities and revised deadlines. Distribute the updated calendar to keep everyone apprised.
STEP 3. SELECT OR DEVELOP A COURSE WITH A FORMAT AND CONTENT THAT WILL MEET THE IDENTIFIED TRAINING NEEDS

Once you have identified your jurisdiction’s priority training needs, a critical task is to find or develop a curriculum that will address them. The key decisions are:

**Target audience.** *Who needs the information or skills in order to improve TB control efforts?* One of the primary functions of needs assessment activities is to determine the appropriate audience for your training based on gaps in the program. Training can be more sharply focused when the participants have similar roles, interests, or backgrounds. Therefore tailoring your training event to a particular professional category is likely to provide the best results. Some trainings may be strictly clinical (MDs, nurses) while other may be programmatic (outreach workers, program managers) or some combination of the two. Try to limit training sessions to participants of same professional level, and avoid mixing supervisors with subordinates. These strategies will create a more open, non-hierarchical training environment.

**Objectives.** *What skills or knowledge do you want participants to achieve?* Clearly defined objectives serve three purposes: (1) they guide the course planners in developing the course agenda and are given to faculty to aid them in creating their presentations, (2) they give participants reasonable and consistent expectations about the benefits they will gain from attending, and (3) they provide concrete measures for course evaluation. This aspect of training should be very well thought-out, based on needs assessment findings. All course objectives should be stated, measurable, and made available to participants prior to training.
Content. *What subject matter should the training program cover?* Different audiences have different informational needs. Your training event could focus on basic information about TB ("TB 101"), innovative clinical practices and procedures, case management and contact investigation strategies, epidemiological tracking systems, TB-related policy issues and societal concerns, or some combination of these topics. Dealing with narrower topics in some depth often yields better results than trying to cover a broad range of subjects at one time.

Format. *How should the course be presented?* Common options include, but are not limited to, half-day or full-day workshops, a seminar presented over two or more consecutive days, or a course presented once a week for several weeks. Many trainings involve a series of presentations on various aspects of the main topic, bringing participants together with experts in the field for lectures, discussions, information exchanges and interactive activities. In planning your format, keep in mind the schedules and workloads of the course participants.

Resources are available to assist you in developing a training event, including course curricula that you can adapt, use as is, or use as a model for designing your own program. See *Resources for Further Information* in this Toolbox for details on materials available and their source organizations.

**PRE-COURSE TASKS**

**ACTIVITY 3-A**
Determine the target audience (who should receive the training) and the subject matter to be covered (by utilizing findings from needs assessment activities).

**ACTIVITY 3-B**
Develop a list of objectives that the training program should enable participants to achieve. In other words, what knowledge or skills do you want them to gain as a result of this training? Be clear and specific.
Associated Tool #17  Course Objectives
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 3-C
Investigate whether there are existing course curricula and materials that could meet your objectives. Identify sources and obtain information and samples for assessment. (See Resources for Further Information). Often, state or federal clinical or programmatic guidelines can function as the basis of your curricula.

ACTIVITY 3-D
Select an existing curriculum to use or adapt or develop your own curriculum.

ACTIVITY 3-E
Determine the course format that will present the information most effectively to your audience.

ACTIVITY 3-F
Make a preliminary course agenda, listing the anticipated presentation topics, the order in which they will occur, the length of time to be allotted to them, and the names of prospective faculty members or presenters. (See Step 6: Faculty).

Associated Tool #16  Course Agenda
(Source: Francis J. Curry National TB Center, San Francisco)
STEP 4. ESTABLISH A BUDGET AND SYSTEMS FOR HANDLING AND TRACKING EXPENDITURES AND INCOME

Budgeting and financial procedures are an important part of planning. The costs involved in implementing a training program will vary according to such factors as the location, the amount of sessions conducted, the materials provided, and the number of faculty and the payment arrangements made with presenters, and how many participants will attend. A well-crafted budget will help you avoid surprises and maintain careful stewardship of your organization’s resources.

Alert your financial staff to the scheduled training as early as possible and work with them to establish a realistic budget, identify sources of funds, and create procedures for issuing purchase orders, processing invoices, and tracking and paying expenses. Areas where significant costs might be incurred include: space rentals and fees at off-site locations, honoraria and travel expenses for faculty, catering services, printing of course materials, and audiovisual services. Consult and get a quote from vendors to help establish your financial needs. Consider less obvious costs as well, in particular the staff time required, and how that may affect the program.

One key financial decision is whether to charge participants a fee and, if so, how much. Doing so can enable you to recover some or all of your costs. However, if the price is too high, your target audience may be discouraged from attending. One way to address this possibility is to offer reduced rates due to financial hardship, which can be considered on a case-by-case basis. In your marketing and registration materials, describe what the fee covers and explain your payment procedures and deadlines.
**PRE-COURSE TASKS**

**ACTIVITY 4-A**
Review the steps or modules involved in producing a training program and develop a list of cost categories. These may include printing, site rental, catering, honoraria, and audiovisual support. If budgets or cost details from earlier training programs are available, they can be a useful source of information.

**Associated Tool #15  Budget Summary**
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 4-B**
Determine whether you will charge a fee to participants to defray the costs of the training and, if so, what the amount of the fee will be. Create policies and procedures for processing payments (will you be able to process credit card payments? Will you accept vouchers or purchase orders?) and policies for dealing with such questions as reduced rates or scholarships for participants with financial hardships.

**ACTIVITY 4-C**
Determine which faculty members, if any, will be offered honoraria and in what amount. Also, set a policy regarding reimbursement of training-related expenses incurred by faculty: what types of expenses will be reimbursed? what are limits on reimbursable amounts? See if any expenses can be paid up-front, prior to the training, to reduce the amount faculty needs to pay out-of-pocket.

**ACTIVITY 4-D**
Obtain estimates from suppliers or vendors for individual expense items including binders, other handouts, CD-Roms, slides, catering, etc. Compare these estimates and choose the least expensive option that can meet your needs.
**ACTIVITY 4-E**
Develop a budget, based on the estimates of the expenses that will be incurred as well as any expected income (e.g., grants or participants’ fees, if any).

**ACTIVITY 4-F**
Submit the budget for approval according to your agency’s or organization’s procedures.

**ACTIVITY 4-G**
Set up a system for properly allocating and monitoring the training income and expenses and for comparing the actual receipts and costs to the budget projections. An accurate accounting of the financial results will be of considerable value in evaluating the success of this training and planning future ones.

**ACTIVITY 4-H**
Set policies and procedures, or review existing ones, for handling procurements, obtaining purchase orders, approving invoices, processing reimbursement requests, and issuing payments.
STEP 5. **SECURE A SUITABLE LOCATION FOR THE TRAINING**

One of the first decisions you will need to make is whether to hold the training on-site or off-site. If your facility has a suitable space and if hosting the training there will not cause undue disruption for staff members who are not involved, an on-site training is a good option. It is generally more cost-effective and the logistics can be easier to handle. However, if your facility doesn’t meet those two conditions (and if you have the necessary funds), an off-site location, such as a hotel or conference center, is the better choice.

**Space requirements.** What defines a suitable space depends on the schedule and format of the training and the number of participants you expect. The basic requirements include:

- A main meeting room that is large enough to comfortably accommodate all of the training participants as well as the needs of the instructor (podium, screen, other audiovisual equipment, etc.)
- Additional rooms for concurrent tracks of program or small breakout sessions, if any are planned
- A foyer outside of the training space for registration and breaks. If you will be offering food or coffee during these times, the space should be large enough to accommodate the service tables and participants’ movement around them
- A location for meals or hospitality activities such as a reception, if these are planned as part of the training. For an all-day training with no meal service, consider whether there are restaurants nearby that can provide participants with quick and comfortable service at a reasonable cost
- Adequate parking for course participants, located within an easy walk of the training site. Double-check whether there will be other functions at the facility that could interfere with the availability of parking
• Storage space (if using an off-site facility) for materials that will be shipped to the site in advance

Using an off-site facility. When working with an off-site facility, it is important to communicate your needs and expectations clearly and to obtain agreements and understandings in writing. Identify an individual on the facility staff who can serve as your contact person and liaison and obtain his or her phone and pager numbers. This person can be a valuable ally, helping you figure out the best way to meet your needs and resolving problems before and during the training. Remember to put all your requests to the training site provider (A/V needs, catering, room set-up) in writing.

**PRE-COURSE TASKS**

**ACTIVITY 5-A**
Develop a detailed, itemized list of the space requirements for your training event.

**Associated Tool #12 Site Requirements for an Off-Site Training**
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 5-B**
Determine whether your own facility can accommodate the event or if you will need to hold it off-site.

**ACTIVITY 5-C**
If the event will be off-site, identify several possible facilities and contact them to determine:

- Ability to meet your space requirements
- Availability on your scheduled dates
- Estimated costs

Compare the information to determine the most promising locations.
ACTIVITY 5-D
Visit the most promising sites and use your itemized list to determine their suitability. A site visit is important because brochures, websites, and telephone conversations often do not adequately convey the appearance, amenities, and atmosphere of a place, and may not describe factors important to your site selection.

ACTIVITY 5-E
Decide on your preferred site and negotiate a contract with the management. Be sure that the contract clearly specifies:

• The spaces being booked and the room set-up requirements
• Any and all supplies, equipment and services that will be provided by the site manager—for example, audiovisual, catering and parking
• Costs and fees for all rentals and services
• Any terms and conditions of use, such as the cancellation policy, or guarantees regarding numbers of participants (e.g., will you be charged for forty meals even if only thirty people show up?), or discounts offered if you book a minimum number of rooms for participants and faculty.

ACTIVITY 5-F
Identify a person on the facility staff (usually a catering/banquet service manager) to serve as your contact person and liaison.
One of the most important aspects of training is recruiting, communicating with, and preparing materials for the course faculty. Having presenters who are knowledgeable, skilled, and well prepared contributes immeasurably to the value that the participants will derive from the course. It is important that each member of the faculty has an overview of the entire course so as to avoid any repetition of information during the training. It is the course planner’s responsibility to provide faculty with course objectives and an agenda and to review their submitted materials to avoid repetition or omissions.

Communication is a key to successful and productive relationships with faculty members. By keeping in touch with faculty throughout the planning of a course, you can ensure that your expectations and deadlines are met.

**PRE-COURSE TASKS**

**ACTIVITY 6-A**

Identify individuals who have the expertise, experience, and presentation skills to make them good faculty members for particular topics to be covered in the training. Sources where faculty might be found include:

- Your agency’s or organization’s staff
- Other health organizations in your region
- Nearby colleges, universities, or medical schools
- State and federal agencies
ACTIVITY 6-B
Contact potential faculty members by phone to explain the training program and invite them to be part of the faculty.

ACTIVITY 6-C
Send each faculty member a confirmation packet consisting of:

- A confirmation letter (or a letter and information sheet) that:
  - Thanks the person for agreeing to participate
  - Specifies the topic, date, time, and location of his or her presentation
  - Provides the deadlines for submitting syllabus materials and handouts for production
  - Indicates the amount of any honorarium and lists types of expenses that will be reimbursed
  - Describes how travel arrangements, if any, will be handled

Associated Tool #18 Faculty Confirmation Letter
(Source: Francis J. Curry National TB Center, San Francisco)

- An audiovisual fax-back form asking for information on:
  - Slides, overhead projections, or other materials that will need to be produced
  - Equipment that will be needed for the presentation

Indicate deadlines for returning both the form and delivering materials to be used for the course such as slides or overheads. Allow adequate time (at least one month before the course date) to handle production tasks and arrange for the necessary equipment. (See Step 12: Audiovisual).

Associated Tool #19 Faculty Audiovisual Fax-Back Form
(Source: Francis J. Curry National TB Center, San Francisco)
• A draft agenda and draft objectives for the course
• Instructions for preparing and submitting syllabus materials or templates that faculty can use to create their own materials

**Associated Tool #24  PowerPoint Slide Template**
(Source: Francis J. Curry National TB Center, San Francisco)

• An information sheet describing allowable travel expenses and your policies and procedures regarding reimbursement along with a fax-back form asking for an estimate of travel costs

**Associated Tool #26  Travel Arrangement and Reimbursement**
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #27  Travel Cost Estimate Fax-Back Form**
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 6-D**
As the audiovisual forms and syllabus materials arrive, provide them to the staff member who is in charge of those steps. Follow-up with any faculty member whose form or materials are not received by the deadline.

**Associated Tool #20  Faculty Materials Reminder**
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 6-E**
Make any necessary travel arrangements, coordinating with the faculty member involved. Follow up if the fax-back form with the travel cost estimate is not received by the deadline.

**ACTIVITY 6-F**
One week prior to the course, mail or fax a final letter to confirm the topic, date, time, and location of the presentation; give directions to the training site; and provide any last-minute changes or instructions. Attach a copy of the final course agenda and objectives, a summary profile of the expected participants (for
smaller courses) and any other information that would be helpful to the faculty (including the final course materials, if possible).

**Associated Tool #21  Faculty Final Confirmation Letter**  
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #25  Summary Profile of Course Participants**  
(Source: Francis J. Curry National TB Center, San Francisco)

**DAY-OF-EVENT TASKS**

**ACTIVITY 6-G**
Assign a staff member to assist faculty as needed during the training (this may include: distributing handouts, making photocopies, coordinating arrangements for departure travel, and setting-up and running A-V equipment [for on-site courses]). (See Step 14: Staff Coverage)

**POST-COURSE TASKS**

**ACTIVITY 6-H**
Send each faculty member a thank-you letter that is individualized to reflect participants’ comments regarding his or her presentation. Include a copy of the faculty member’s section of the evaluation summary report. (See Step 15: Evaluation, Activities 15-F and 15-G)

**Associated Tool #54  Faculty Thank-You Letter**  
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 6-I
Follow-up with faculty members to be sure their requests for expense reimbursement are handled correctly and promptly, with necessary receipts attached.

ACTIVITY 6-J
Process and mail payments of faculty honoraria and expense reimbursements in a timely manner. If you are able, enclose the check with the thank you letter.
STEP 7. DEVELOP AND PRODUCE WRITTEN MATERIALS TO SUPPORT AND REINFORCE THE TRAINING

Producing the written materials that will support your training program is a time-consuming effort and a major expense category. It is also an area where attention to detail pays off. These materials help participants understand what to expect from the training experience and give them a valuable resource for review and reference after the course is over. They can also enable you to obtain valuable feedback on what participants have learned and how well the course met their needs.

Typically, the materials distributed to participants fall into three categories. The first two are given to participants upon arrival; the third consists of items to distributed at later points in the program:

1. Course syllabus. A binder or bound booklet containing the course schedule and objectives, as well as outlines, case studies, articles, and other information organized to supplement each of the training presentations.

2. Training portfolio. A folder or packet containing additional information that will be helpful to participants while they are at the training session, such as a roster of participants, information about continuing education credits, and a list of local restaurants. The portfolio also provides a convenient way to distribute pre-tests, evaluation forms, and similar items.

3. Other handouts. The post-test (distributed at end of training course), items that instructors wish to have distributed during their presentations (such as case studies), and other materials as needed.
For detailed information on creating the contents of the course syllabus and portfolio, along with production tips and guidelines, please see:

**Background Guide 1. Training Materials**

**PRE-COURSE TASKS**

**ACTIVITY 7-A**
Make a preliminary checklist of contents for each of the three categories of written materials — the syllabus, the portfolio and any additional handouts to be distributed during the course of the training. These lists will most likely require modification during the production period.

**Associated Tool #2 Preliminary Checklist**
(Source: Florida Department of Health)

**Associated Tool #3 Preliminary Course Checklist**
(Source: Francis J. Curry National TB Center, San Francisco)

**Syllabus Contents:**

**Associated Tool #37 Syllabus/Portfolio Title Page**
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #16 Course Agenda**
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #17 Course Objectives**
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #38 Faculty List**
(Source: Francis J. Curry National TB Center, San Francisco)
Portfolio Contents:

Associated Tool #37  Syllabus/Portfolio Title Page
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #39  Credit Information Page
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #40  Evaluation Form (long version)
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #41  Evaluation Form (short version)
(Source: Florida State Department of Health)

Associated Tool #42  Pre-test
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #43  Worksheet for Program Modification
(programmatic courses)
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #44  Clinician Questionnaire
(clinical courses)
(Source: Francis J. Curry National TB Center, San Francisco)

Other Handouts:

Associated Tool #43  Worksheet for Program Modification
(programmatic courses)
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #44  Clinician Questionnaire
(clinical courses)
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 7-B
Determine how to package and present the materials. Typical choices include: binders with tabbed dividers, paper folders with pockets, or bound booklets (depending on the volume of the items to be included, how they will be used, and the available budget). For “train-the-trainer” offerings, masters of course materials (PowerPoint presentations, pre- and post-tests, etc.) can be provided on CD-ROM in binder pockets.

ACTIVITY 7-C
Consult with your printer or photocopy service to determine:

- When the masters or originals for the materials must be submitted in order to guarantee delivery of the finished materials in time for the training
- The preferred format for the masters or originals (possibilities include camera-ready pages, disks, and electronic files of various types)
- The estimated cost

Associated Tool #34 Tab Order and Production Timeline
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 7-D
Working backward from the date of training, develop a written plan and schedule for producing the materials. Assign responsibilities for coordinating and completing the tasks. Take into account the time needed for:

- Arrival of all materials being provided by outside sources, such as faculty members
• Creation of original materials, including writing, formatting, editing, proofreading, and making corrections. Note: Everything should be proofread at least twice, by two different people—this is very important

• Delivery of masters or originals to the printer, copy service, or other vendor

• Review, return, and correction of any proofs that the printer may provide

• Printing or copying

• Ordering and delivery of binders, tabbed dividers, bound booklets, pocket-folder portfolio covers and other packaging items

• Assembly of materials into the folders or binders

• Delivery of materials to the training site

Build time into the schedule for the inevitable missed deadlines, errors, and glitches.

Associated Tool #1   Training Program Checklist
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 7-E**

Notify the faculty of your syllabus guidelines and production deadlines in the initial confirmation letter. (See Step 6: Faculty, Activities 6-C and 6-D)

Associated Tool #18   Faculty Confirmation Letter
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #24   PowerPoint Slide Template
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 7-F
Follow-up with faculty members who have not submitted materials by the deadline.

Associated Tool #20   Faculty Materials Reminder
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 7-G
Draw up a contents checklist for the each of the three categories (see associated tool #3 Preliminary Course Checklist)—the syllabus, the portfolio, and additional handouts—and set up folders into which materials can be organized as they arrive or are produced. Create separate folders for each session or topic.

ACTIVITY 7-H
Carry out the materials production plan, coordinating with the printer to ensure on-time delivery.

ACTIVITY 7-I
If conducting an off-site training, notify the venue’s contact person to expect delivery of the materials. Arrange to have them safely stored and then brought to the training room when needed.
STEP 8. ARRANGE FOR CONTINUING EDUCATION CREDITS

Continuing Medical Education units (CMEs) and Continuing Education Nursing units (CEs or CNEs) can be of value to members of your audience and provide an incentive to attend the training. Many healthcare practitioners are required to earn a certain average number of credits per year in order to maintain their licenses or advance to higher positions. Other types of continuing education credit exist and can be explored, based on your audience.

Before you can offer CMEs and CEs, your organization must be approved as a continuing education provider by the appropriate board, or you must find an existing accredited agency (often an American Lung Association affiliate, a State health program, or a university) to co-sponsor your event. In either case, the course content, format, and faculty must meet certain requirements. To learn about accreditation requirements and regulations, contact:

- For CMEs: Accreditation Council of Continuing Medical Education (ACCME, 15 N. State Street, Suite 2150, Chicago, IL 60610; (312) 464-2500; http://www.accme.org), your state medical society, or the American Lung Association
- For CEs: Your state Board of Nursing or the equivalent agency (often local health departments have CE accreditation)

You will want to include information on course credit in your marketing materials, so be sure to begin this process in well in advance of the scheduled date of the training program. The accrediting agency will probably require four to six weeks to review and process your application.
Accrediting agencies conduct periodic reviews or audits to ensure that procedures are being followed and requirements are being met. It is essential, therefore, to keep complete and accurate records to document that participants have earned the credit units they have been awarded. Important records include the course sign-in sheets and the completion certificates sent to participants after the course.

**PRE-COURSE TASKS**

**ACTIVITY 8-A**
If your agency is not already accredited to offer continuing education hours, identify a potential co-sponsor (including American Lung Associations, state and county health departments, and universities) and contact that organization to request information about offering course credit and obtain application forms. Or if you prefer, contact the appropriate agency to pursue your own accreditation.

**ACTIVITY 8-B**
Submit your application forms, fee, and any requested supporting documentation (for example, a copy of the course brochure) to the accrediting agency.

**Associated Tool #9 Continuing Education Co-Sponsorship Application**
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 8-C**
Calculate the number of CME or CE credits that participants will earn. Course credit is figured by adding up the total number of course hours (adjusted to the nearest quarter hour) and subtracting time for breaks, lunches, registration, and introductions. Nurses earn slightly more credit for their contact hours than doctors (see your accreditation agencies’ policies to determine correct amount).
ACTIVITY 8-D
Ensure that the marketing materials for the course enumerate the CME or CE credits that can be earned and include any information that the accrediting agency requires. (The California Board of Registered Nursing, for example, issues identifying numbers to continuing education providers and asks that the number appear on all promotional materials and completion certificates.)

Associated Tool #10 Course Brochure
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-E
For the course portfolio (see Step 7: Training Materials), prepare a credit information page according to the specifications of the co-sponsor or accrediting agency that tells participants:

- The name, date(s), and location of the course
- The number of hours of instruction offered
- The name of the accreditation agency that has approved the credit
- Your agency’s name and identifying number as the continuing education provider
- The requirements (attendance, pre-/post-test, evaluations) that must be completed in order for the participant to receive credit
- Your timeframe for sending out completion certificates

Associated Tool #39 Credit Information Page
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #61 Wording for C.E. Certificate
(Source: Francis J. Curry National TB Center, San Francisco)
DAY-OF-EVENT TASKS

ACTIVITY 8-F
Ensure that the participants sign the sign-in sheets at the beginning of each day and at subsequent points in the day (e.g., on returning from lunch) if that is required by the accrediting agency.

Associated Tool #46 Sign-in Sheet
(Source: Francis J. Curry National TB Center, San Francisco)

POST-COURSE TASKS

ACTIVITY 8-G
Use the sign-in sheets to determine the number of units to be awarded to each participant (did they arrive late? leave early? This should be reflected on sign-in sheet). Double check to make sure participants signed-in and (if they requested CE/CME units) provided their medical license numbers. Original sign-in sheets (not copies) must be filed in course credit file (see below).

ACTIVITY 8-H
Prepare and mail certificates of completion and/or certificates of CME or CE credits for the participants. (Some training organizations choose to preprint these certificates and hand them out to participants at the completion of training.)

Associated Tool #58 Continuing Education Certificates
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #59 Certificates of Completion
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-I
Set up a course credit file that contains items required by co-sponsoring agency or, if your organization is accredited, that the accrediting agency can review if you are audited. This file includes:
• All marketing materials (brochure)
• Documentation regarding the course curriculum and agenda, including the number of training hours
• A summary of results from the needs assessment if one was conducted
• Faculty disclosure of commercial support statement
• Sign-in sheets from the training days, showing participants’ signatures and time of arrival or departure if they arrive late or leave early
• Copies of each participant’s certificate of completion
• Summaries of evaluations and pre- and post-tests
• Curricula vitae for all faculty

Associated Tool #7 Course CME Credit File
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #8 Continuing Education Course File Checklist
(Source: Florida Department of Health)

Associated Tool #2 Preliminary Course Checklist
(Source: Florida Department of Health)

Associated Tool #10 Course Brochure / Application
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #16 Course Agenda
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #22 Faculty Disclosure Statement
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #46 Sign-in Sheet
(Source: Francis J. Curry National TB Center, San Francisco)
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**Associated Tool #55**  Summary of Evaluation Data  
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #56**  Summary of Pre-/Post-Course Scores Per Participant  
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #58**  Continuing Education Certificate  
(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #6**  Needs Assessment Survey Summary  
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 8-J**
Put these items into course credit file or, if you have a co-sponsor send relevant materials to the organization that co-sponsored your event and/or provided units to participants.

**Associated Tool #7**  Course CME Credit File  
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 8-K**
Update your database to include the participants’ course status and credits earned.
STEP 9. CONDUCT MARKETING ACTIVITIES TO ATTRACT THE TARGET AUDIENCE

You will want to promote and advertise your training course in order to inform prospective participants about the opportunity and to encourage their attendance. In conducting marketing activities your objectives are to reach as many members of your target audience as possible and ensure that the course is fully attended by the right people.

An effective marketing tool is an informational piece developed specifically for the course and mailed directly to targeted individuals. It need not be fancy or expensive. One simple solution is a three-panel brochure – an 8.5 x 11 sheet of paper in a three-part fold. The brochure can be made into a self-mailer (no need for an envelope) by leaving one panel blank except for a return address. After the brochure is printed and folded, the address label and postage are affixed in the appropriate places. Use the reverse side of the blank mailing panel for an application form. That way, the recipient can send in the form and still have complete information about the training program on the remaining panels. The paper stock should have at least a 20-pound weight so that it will hold up to mailing, and be a light color to permit photocopying and faxing. These brochures can also be handed out at other health-related trainings or conferences.

Another approach is to send a packet that incorporates a cover letter, a descriptive flyer or brochure, a separate application form, your organizational brochure, and other materials you may wish to include. A marketing packet is more flexible than a three-panel brochure, and it accommodates a greater amount of information and a more complex application form. But it is more expensive and time-consuming to produce, assemble, and mail.

E-mail broadcasts are an effective and virtually cost-free method of marketing the training event. This will require someone to create an e-mail list that includes the target audience, or you may ask another health-related agency to share theirs with you.
PRE-COURSE TASKS

ACTIVITY 9-A
Review your target audience so that your marketing activities can be effectively focused.

Associated Tool #6      Needs Assessment Survey Summary
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 9-B
If an outside agency is providing continuing education units, check its requirements regarding promotional materials. Some agencies require that their name appear on the title panel and that they have a copy of the brochure or flyer on file before it is distributed to the public. Many also require that objectives and credit information are included in any promotional materials (See Step 8: Continuing Education).

Associated Tool #10      Course Brochure
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #17      Course Objectives
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #61      Wording for C.E. Certificate
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 9-C
Produce an informational piece, such as a flyer or brochure that provides the following information:

- The name of the sponsoring organization
- Dates, times, and location
Developing and Presenting TB Control Training Courses

- A brief overview of the course format and the topics to be covered
- The course objectives
- A list of the faculty (if you have confirmed them)
- The number of continuing education units offered
- Registration procedure
- An application form (see Step 10: Registration, Activity 10-A)
- Contact information

**Associated Tool #10  Course Brochure**
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 9-D**
Develop or obtain lists of prospective participants with contact information—name, title, organization, mailing address, phone and fax numbers, and e-mail address. Sources could include your own mailing list and those of other health-related and community agencies and organizations. If you are using lists from several different organizations, crosscheck each name to avoid duplicate mailings. As a rough rule of thumb, plan to mail to eight to ten times the number of people you anticipate having in attendance.

**ACTIVITY 9-E**
Mail the brochures and application forms on a schedule that allows participants ample time to plan for their attendance and send in their applications. This should occur at least two months in advance of the training.

**ACTIVITY 9-F**
Determine other ways to inform prospective participants about the training and persuade them to enroll. Options include:

- Placing an announcement in your organizational newsletter
• Arranging for announcements in newsletters of relevant organizations or other health-related publications

• Distributing brochures at meetings or conferences sponsored by associated organizations

• Posting information about the training on your organization’s website

• Including a listing of the course in any pertinent catalogue to which you have access

• Using broadcast e-mail

**Associated Tool #10  Course Brochure**

(Source: Francis J. Curry National TB Center, San Francisco)
STEP 10. SET UP A REGISTRATION SYSTEM

Registration of participants is a key element of every training event, and a good registration system is well worth the effort required to set it up and maintain it. Such a system enables you to easily and accurately keep track of your anticipated and actual attendees, communicate with them when needed, monitor their payment for the course, and award continuing education credits. Registration activities occur throughout the time span of the training program. As shown below, they can be divided into pre-course, day-of-event, and post-course tasks.

PRE-COURSE TASKS

ACTIVITY 10-A
Develop an application/registration form that provides the information you will need to communicate with applicants, screen their applications, and determine their expectations with regard to the training. This form is your primary source of information on the participants, so it should be designed with care. At a minimum, provide space for:

- Name
- Degree
- Organizational affiliation
- Position title
- Contact information (including postal address, email address, and telephone and fax numbers)
- Whether the applicant would like continuing education credits (CEs or CMEs)
- Medical license number (if requesting CEs or CMEs)
When planning a course with a defined target audience (e.g., nurses who spend more than 10 percent of their time working with TB patients), create an application form that asks participants about certain criteria related to the training which will determine if the applicant is qualified, such as:

- Job responsibilities related to TB
- Experience in working with TB patients
- Knowledge or skills the applicant hopes to gain from the course
- Percentage of time spent working with TB patients

**Associated Tool #10  Course Brochure / Application**  
(Source: Francis J. Curry National TB Center, San Francisco)

You may also have prospective participants fill out a supplemental application which can provide further information regarding their suitability for the training.

**Associated Tool #11  Supplemental Application**  
(Source: Francis J. Curry National TB Center, San Francisco)

**ACTIVITY 10-B**  
Determine if applicants will be required to provide a refundable deposit or full or partial payment of fees in order to secure a space in the course and set up a system for processing these payments. Determine a deadline by which the check should be received. If your organization is set up to handle credit card payments, that is a convenient alternative that you may wish to offer to your applicants.

**ACTIVITY 10-C**  
Set up a list or database for keeping track of all applicants. Include space to record the information in Activity 10-A, plus:

- The date the registration or application form was received
- Status (accepted, rejected, waiting list)
• Payment status (if applicable)
• Attendance at the training event (post-course)
• Continuing education credits earned (post-course)

**ACTIVITY 10-D**
Screen the registrations or applications. In many cases, all individuals who express interest are allowed to attend the training. However, if there are requirements that must be met or you receive more applications from participants than you can accommodate, you will need to determine which applicants qualify and which do not. Maintain a list of all applicants and their status for future reference.

**ACTIVITY 10-E**
If there are more qualified applicants than can be accommodated, compile a waiting list. The usual policy is that qualified applicants are accepted in the order that their applications are received, so that the waiting list includes the last applicants to apply. You may also wish to limit the number of participants from any one health department or region in an effort to more effectively distribute the information. If you wish to screen all applications before deciding who to enroll make the due date for them well before the event.

**Associated Tool #30 Participant Waiting List Letter**
*(Source: Francis J. Curry National TB Center, San Francisco)*

You might wish to ask for a refundable deposit whether or not a fee is charged for the course:

• No-fee course: The deposit is a good-faith indicator that the applicant plans to attend. Retain the checks in a secure place, and return them to the applicants on the first day of the training

• Fee course: You can ask for either partial or full payment to be made in advance. If you request only a partial payment, the balance should be due not later than the first day of the training
ACTIVITY 10-F
Assemble a confirmation packet and send it to accepted applicants. The packet should include:

- A confirmation letter that includes a reminder of the date, time, place and cost (if any) of the training, and specifies any deposit or payment requirements. This letter should also contain a brief description of what participants can expect (will there be a clinic tour or some other activity which may require walking?) and a dress code for training (usually inviting participants to dress comfortably)
- A list of nearby overnight accommodations for participants who will be traveling a distance to attend (if applicable)
- Directions for how to get to the training site, parking information, and public transportation options
- The name of a contact person for further information

Associated Tool #28 First Participant Confirmation Letter
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #31 Hotel List, San Francisco, California
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #32 Directions to Training Site (CNTC)
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-G
Write rejection and waiting list letters and send them to the applicants who are in these categories.

Associated Tool #29 Participant Rejection Letter
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #30 Participant Waiting List Letter
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 10-H
Process deposits and payments as they are received. If an expected deposit or payment check is not received by the deadline, follow-up with the applicant to confirm his or her intention to participate. Decide internally how to proceed if check is not received by a given date.

ACTIVITY 10-I
If an accepted participant cancels, notify the person at the top of the waiting list that there is a space available. If that person accepts the space, send them a confirmation packet.

ACTIVITY 10-J
One week prior to the first day of training, e-mail, fax, or mail a reminder to all accepted participants. This notification recaps the information in the confirmation packet, including directions to the site, parking information and public transportation options.

 Associated Tool #32 Directions to Training Site
(Curry Center, SF)
(Source: Francis J. Curry National TB Center, San Francisco)

 Associated Tool #33 Final Participant Confirmation Letter/Fax
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-K
Create sign-in sheets to use for registering attendees as they arrive. The sign-in sheet should include the participant’s name, degree, and license number, and be arranged alphabetically by last name.

 Associated Tool #46 Sign-in Sheet
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 10-L
Create nametags for participants. Preprinted nametags showing the participant’s name and affiliation are easier to read and look more professional than handwritten ones and they can be easily prepared using a word processing program. You can obtain nametag blanks and plastic holders from an office supply store. Keep some blanks on hand for walk-ins or in case there are changes.

Associated Tool #47  Participant Name Tags
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 10-M
For courses that are held in a U-shaped classroom style (fewer than 30 participants, see Step 11: Arrange for the Configuration and Set-up of the Meeting Space), create name signs (table tents) for participants. Like nametags, these can easily be prepared using a word processing program. The names are printed lengthwise on 8.5" x 11" cardstock, which is folded so that participants can place them on the table in front of them when they find a seat in the training room. Proofread them carefully to be sure the names are spelled correctly.

Associated Tool #48  Participant Name Sign
(Source: Francis J. Curry National TB Center, San Francisco)

DAYS-OF-EVENT TASKS

ACTIVITY 10-N
Set up the registration area. For a small, on-site course, your reception area might serve this purpose. For a large, off-site training program, the registration area ideally should be located in a lobby or foyer just outside the training room.

For the large courses, you will need a table with room for registration staff (usually 2-3 people) to sit and work comfortably. If you expect a high number of participants, you may want two or more tables. Put the materials to be distributed within easy reach. Nametags and name signs can be arranged
alphabetically on a nearby table for participants to pick up themselves if that is more convenient.

For large courses, assign each registration staff person to be responsible for a particular segment of the alphabet (A-D, E-J, etc). Place signs to direct arriving participants to the correct alphabetical station.

**Associated Tool #49  Directional Sign**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Associated Tool #50  Directional Sign: Registration Table**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Associated Tool #51  Directional Sign: Registration Instructions**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Associated Tool #52  Directional Sign: Help Table**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Associated Tool #53  Directional Sign: Pre-/Post-Test Instructions**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**ACTIVITY 10-O**
As participants arrive, have the registration staff:

- Greet and welcome them
- Instruct them to sign the sign-in sheet and verify that their name is spelled correctly and their medical license number and degree(s) are accurate
- Give them their course materials, nametags, and name cards, or direct them to the place where these items can be picked up
- Let them know where the pre-test (if applicable) is (portfolio) and advise them that it will be picked-up prior to start of the training
• Answer questions or, if appropriate, direct the questioner to another staff member for assistance

ACTIVITY 10-P
Have participants sign in at the start of each day of a multiple-day course. If necessary for purposes of awarding credit, have them sign in a second time later in the day (when returning from lunch or at the end of the day).

Associated Tool #46  Sign-in Sheet
(Source: Francis J. Curry National TB Center, San Francisco)

POST-COURSE TASKS

ACTIVITY 10-Q
Ensure that the post-course tasks regarding the awarding and documenting of continuing education credits are carried out. (See Step 8: Continuing Education, Activities 8-G through 8-J.)
STEP 11. ARRANGE FOR THE CONFIGURATION AND SET-UP OF THE MEETING SPACE

The training space should meet the needs of the instructor, the participants, and the training curriculum—accommodating participants comfortably and facilitating the effective operation of the training. The actual set-up rarely takes place earlier than the day before the start of the training, and often doesn’t occur until that morning. However, planning ahead pays off. When the set-up of the space has been well thought out, the sessions function more smoothly and productively.

It is important to remember that some participants may have physical disabilities or may be sight- or hearing-impaired. Be sure that you have a plan and the resources to accommodate their needs.

Seating arrangements. For large groups, classroom-style seating (rows of tables and chairs facing the front of the room) is preferable. This way, participants have a writing surface in front of them so they can take notes and peruse training materials. Be sure to allow enough space between the chairs and the tables behind them so that people can get by easily.

A second option is auditorium-style (or theatre-style) seating (rows of chairs with no tables). Though less desirable, this arrangement may be less costly and will accommodate more participants in the same space. If course materials are provided in a three-ring binder or bound booklet, participants will have something to write on.

For a small group, a U-shaped arrangement of tables and chairs or seating around a conference table might be workable alternatives, especially if the goal is to encourage interaction among the participants.
**Aisles.** Provide for adequate center and side aisles to accommodate the placement of floor mikes and the movement of people. Also, allow room between rows of chairs, or between chairs and the tables behind them, so that people can reach their seats easily.

**Faculty area.** There should be adequate space at the front of the room to provide for the needs of the faculty. If the room is very large, asking the presenter to stand on a raised stage or platform will help participants see and hear the presentation and the accompanying audiovisuals more clearly.

Check with faculty members in advance to see what their preferences or requirements are. Most will want a podium; in some cases a small table on which to organize materials is also appreciated. The presenter will appreciate it if a container of drinking water and a glass are placed conveniently at hand.

**Projection screen.** The screen should be large enough to be easily viewed from the back rows. Place it to the side of the presenters, not directly behind them. You want to avoid making them swivel to see their own slides. Sometimes two screens are preferable, especially in a wide room.

**Audiovisual equipment.** See Step 12: Audiovisual for information on arrangements for audiovisual equipment.

**Registration area.** See Step 10: Registration, Activity 10-N, for information on setting up the registration area.

**Catering.** See Step 13: Catering, for information on the set-up of food and beverage service for morning arrival, breaks, and any meals to be served on the premises. If permitted by the site management, arrange for coffee or water to be available in the training room. Either water or coffee service can be set up on a table in the back of the room. If the classroom-style seating is used, water pitchers and glasses can be placed on the tables where participants will be seated.
**Signage.** Signs are helpful in directing participants to various locations and providing brief information. For example, a sign with the name of the course should be posted outside the meeting room, and the registration area and help desk should be appropriately labeled. An advance tour of the facility will help you determine what signs might be needed. Consider display options as well: Will it be possible to tape or pin signs to walls or furnishings, or will you need floor easels or table easels to hold them?

**Supplies and printed materials.** You will need to produce or acquire supplies and printed materials needed to operate the training sessions, transport them to the training location, and set them up to be handled conveniently. The necessary supplies will vary according to the type and size of the training program. Examples include:

- Course materials—the syllabus, training portfolio, and other handouts
- Registration materials—name signs, name tags, sign-in sheets
- Informational materials for participants—requirements for completion, number of units to be awarded, nearby restaurants, etc.
- Administrative and logistical materials—final list of confirmed participants, room coverage assignment sheets, registration and audiovisual checklists, FedEx (or other courier’s) address forms for return shipping, etc.
- Audiovisual supplies—CD-ROMs or floppy disks with presentation materials, LCD or slide projector, laptop computer, projector bulbs, extension cords, slide carousels, overhead transparencies, overhead pens, laser pointers, wireless microphones, etc.
- Office supplies—tape, stapler and staples, thumbtacks or pushpins, scissors, three-hole punch, Post-It notes, markers, extra pens and pencils, etc.
PRE-COURSE TASKS

ACTIVITY 11-A
Obtain a diagram or floor plan of the space from the facility contact person. If none is available, make a detailed sketch of the rooms and areas to be used.

ACTIVITY 11-B
Consult with the facility contact person regarding room capacities, set-up requirements and restrictions, and other relevant information.

ACTIVITY 11-C
Determine your preferred seating arrangement and space set-up plan, including locations or positions for podiums, platforms, audiovisual equipment, registration and catering services, and other space considerations.

Associated Tool #13  Training Room Layout
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 11-D
Coordinate with the facility contact person regarding how, when, and by whom the space set-up will be accomplished.

ACTIVITY 11-E
Make a list of the signs that will be needed, and arrange for their production. Many signs can be created in-house by computer but the creation of large signs or banners may need to be contracted out.

Associated Tool #49  Directional Sign
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #50  Directional Sign: Registration Table
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #51  Directional Sign: Registration Instructions
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 11-F
Develop a checklist of supplies and materials you will need during the course of
the training. Arrange to acquire or produce them, and decide how they will be
transported to the training site.

ACTIVITY 11-G
Assemble and pack the signs, supplies, and materials, using the checklist as a
guide. If they will be shipped ahead, arrange for them to be picked up by or
delivered to the shipper. This should be done far enough in advance to ensure
on-time delivery to the training site.

ACTIVITY 11-H
The day before the training begins, confirm all the space set-up arrangements
with the facility contact person. Do a walk-through of the training site and obtain
information about the light and temperature controls. If possible, be present at
the site during set-up to ensure that it proceeds as planned.
STEP 12. ARRANGE FOR AUDIOVISUAL MATERIALS, EQUIPMENT, AND SERVICES TO ENHANCE THE TRAINING PRESENTATIONS

The audiovisual (A/V) component of the training program has three facets: production of visual aids, projection of those materials so they can be seen by the audience, and voice amplification to allow the presentations to be heard.

Production: Most of your faculty will want to use some form of visual aids to enhance their lectures. The most common options are PowerPoint presentations (computer-based slides), overhead projections, photographic slides and videos, as well as whiteboards or flipcharts, which although low-tech are very useful, especially for capturing ideas on the spot.

Some faculty may have such materials already prepared or be willing to produce their own. Others presenters may request your help with this critical task. For information on producing presentation materials, please see:

Background Guide 1. Training Materials

Projection: You will need to ensure that A/V equipment is ready and in good working order when needed, and that someone is available to operate it during the presentation. The types of equipment you will need depends on what type of visual aids your faculty members plan to use. The most common options are:

- Projection screen, large enough to be easily viewed from the back rows
- LCD projector and laptop computer for PowerPoint presentations
- Overhead projector
- Slide projector, for photographic slides
• Videotape or DVD player and monitor
• Whiteboards or flipcharts with easels
• Lightbox for x-rays (works in small rooms)

Try to keep equipment changes to a minimum. It is a good idea to have extra supplies, such as bulbs, disks or CD-ROMs containing presentations, extension cords, and slide carousels, on hand. If possible, keep an extra projector, overhead projector, LCD projector, and laptop at the ready so that a quick replacement can be made in the event of a technical failure.

**Voice amplification:** If the training room is large or the session is being recorded, you might need voice amplification equipment for the speaker and for audience questions from the floor:

• A fixed podium microphone
• A wireless microphone (many presenters prefer a wireless mike so that they can move freely around the training room)
• Floor mikes or traveling (talk show-type) mikes for audience questions
• Receiver and loudspeakers

**Sources of A/V services.** If you are using an off-site facility, see if there is an in-house A/V contractor. Many meeting sites can provide the equipment and operators needed for a fee. If this is not the case, you may want to bring in an outside firm to take care of the A/V set-up and presentation. A third option, and often the most cost-effective one, is to rent equipment or use your own and have it operated by a member of your staff who is trained to run the A/V equipment that will be used.

**PRE-COURSE TASKS**

**ACTIVITY 12-A**

Ensure that an audiovisual fax-back form is included in the confirmation packet sent to faculty. (See Step 6: Faculty, Activity 6-C)
ACTIVITY 12-B
Follow-up with faculty members whose forms have not been returned by the deadline.

ACTIVITY 12-C
Set up a written master checklist for A/V. For each presentation, itemize the materials to be produced and equipment needs, and set dates for accomplishing the related tasks.

ACTIVITY 12-D
Obtain cost estimates and determine the source from which you will obtain A/V equipment and operators. Possibilities include:

- Having A/V services provided by the site management or its in-house A/V contractor as part of your contract with the training
- Engaging the services of an outside A/V contractor
- Using equipment owned by your organization and operated by your staff
- Renting equipment and having your staff serve as operators

ACTIVITY 12-E
Negotiate a contract, service agreement, or purchase order detailing the A/V services and equipment you will obtain from outside sources.
ACTIVITY 12-F
Arrange for extra projectors, laptops, extension cords, slide carousels, and other supplies to be available on site on the day of the training so that problems can be quickly and easily resolved. If possible, have backup equipment ready to go.

ACTIVITY 12-G
The day before the training begins, confirm all the arrangements with the A/V contractor.
STEP 13. MAKE PROVISIONS FOR CATERING SERVICES TO PROVIDE FOOD AND BEVERAGES ON THE DAY OF THE TRAINING

Food and beverage service is an important part of the training because a bad experience in these areas can have a strong negative affect on the participants’ comfort and satisfaction. Make your arrangements with the caterer several weeks in advance and confirm them the day before the training.

For an on-site course, it is best to contract with a good caterer who is accustomed to working at this type of event. If your training is off-site, catering arrangements should be covered in your contract with the facility. Most facilities insist that their own catering department be used if they have one. If not, you usually must get approval from the site manager to bring in an outside caterer. For small trainings with limited budgets, you may be able bring in food and beverage items yourself. If no funds are available to provide catering, consider asking local restaurants to donate food or services. You may also consider asking participants to bring their own food or drink.

There are several points in the training day when food and beverage service might be expected: upon arrival in the morning, during breaks, and at lunchtime. In some cases it might be appropriate to have a reception at the end of the training day. The question of whether food and drink is allowed into the training space is determined by the site provider.

Morning arrival. As participants arrive and register, a hospitality table should be available. Set it up at least an hour in advance of the scheduled start of the training to accommodate early arrivals. Depending on your budget and other considerations, your options are:
• Beverages only: At a minimum, provide coffee, decaf, fresh water, and hot water for tea. Offer teabags in a selection of black, green, and herbal varieties. Hot chocolate or fruit juice is also appreciated in the morning. Milk, lemon, and sugar should be available.

• Continental breakfast: In addition to beverages, you can offer baked goods, pastries, bagels, muffins, etc. and/or fresh fruit.

**Breaks.** Participants appreciate beverage service during morning and afternoon breaks. Coffee and tea are served in the morning, and should be refreshed throughout the day. In the afternoon, soft drinks, juices, iced tea, and bottled water may be offered. The afternoon break might also include an assortment of snacks, such as cookies or brownies. (Consider specifying with the caterer that the snacks not contain nuts to avoid allergy problems.)

**Lunch.** Full-day sessions require a lunch break. While you can give participants a free hour to find lunch on their own, you may wish to consider providing the meal, especially if there are no convenient, reasonably priced restaurants with quick service located nearby. Also, if the participants remain at the site, it is easier to reconvene the session promptly when the lunch break is over.

An easy option is to provide boxed lunches (usually sandwiches), which greatly simplifies serving and cleanup. The caterer delivers the lunches and a selection of drinks to the training site an hour or two before they are scheduled to be served. Be sure to accommodate participants’ preferences by including both meat (turkey, roast beef, etc.) and vegetarian meals (a good rule of thumb is to estimate 10%-15% vegetarian meals). You may also want to include a kosher option as well.

**PRE-COURSE TASKS**

**ACTIVITY 13-A**

Make a preliminary catering plan based on your predetermined budget. List the points in the training schedule when catering will be needed—arrival and
registration periods, breaks, and lunch on each day—and determine what types of beverages and food (if any) you want to make available to participants at each time.

**ACTIVITY 13-B**
Consult with the facility’s catering manager or with caterers of your own choice to consider specific menu options and obtain cost estimates. Also ascertain the timeframe for submitting the final count of participants to the catering manager.

**ACTIVITY 13-C**
Based on your budget, the caterer’s recommendations, and your preferences, develop a final catering plan. Draw up a written agreement with the caterer that specifies:

- When and where the food service will take place
- The food and beverage items to be provided, including accommodations to special food requests (vegetarian, kosher, etc.)
- Additional items to be provided—dishes, utensils, napkins, condiments, etc.
- The number of people who will be served
- Whether the caterer will deliver food, or prepare and serve it on site; if served, what form the service will take (buffet, sit-down, boxed lunches, etc.)
- Costs, per item or service and in total

**ACTIVITY 13-D**
Call the catering department with the final count of participants (usually 3-4 days prior to the event), including specific food requests.
ACTIVITY 13-E
The day before the training begins, confirm all the arrangements with the caterer.
STEP 14. PROVIDE FOR STAFF COVERAGE TO HANDLE DAY-OF-EVENT TASKS

Participants judge the success of a training on both the value of the information provided and the experience they have while gaining that information. When the event is well organized and the logistics run smoothly, the participants’ experience is enhanced. It is important to have people and systems in place on the day of the training to anticipate needs, monitor the many small details, circumvent glitches, keep program elements on schedule, and accomplish the behind-the-scenes tasks that make the day go well from start to finish.

PRE-COURSE TASKS

ACTIVITY 14-A
Draw up a checklist and schedule for the training, indicating who will be responsible for which tasks during what time period. Tasks to be covered include:

- Transporting all needed supplies and materials to the training site
- Ensuring that the space is set up according to the specifications established for the training program
- Troubleshooting any problems that arise
- Handling any set-up tasks—such as placing signs and unpacking materials—that are not accomplished by the site personnel
- Handling on-site registration activities as participants arrive: directing participants to sign in, giving them their nametags, distributing the course syllabus and portfolio. (See Step 10: Registration, Activities 10-N, 10-O, and 10-P)
• Coordinating with the staff of the training site, audiovisual personnel, and caterers to ensure that their activities are handled smoothly and in accordance with contractual requirements

• Assisting faculty as needed (e.g., distributing handouts, making photocopies)

• Assisting training participants as needed (e.g., providing transportation information and parking validation, answering questions, enrolling late registrants)

• Ensuring that the training room remains comfortable (e.g., having the heat or air conditioning adjusted to a comfortable temperature, seeing that water or coffee is provided or replenished)

• Ensuring that audiovisual equipment is functioning properly

• Ensuring that catering arrangements are fulfilled

• Distributing and collecting pre-tests, post-tests, evaluation forms, and other materials

• Conducting closeout activities at the end of the session, including collecting and packing leftover materials for transport or shipment to your office, and cleaning up as needed

ACTIVITY 14-B
Hold a meeting with the day-of-training team. Distribute the agenda, course schedule, and review the assigned responsibilities to ensure that everyone is clear about the expectations.

Associated Tool #16 Course Agenda
(Source: Francis J. Curry National TB Center, San Francisco)
DAY-OF-EVENT TASKS

ACTIVITY 14-C
Use the checklist and schedule as guides to ensure that all tasks are performed, assistance is provided as needed, and any problems are resolved.
STEP 15. CONDUCT AN EVALUATION OF YOUR TRAINING EVENT

Evaluation is an essential component of your training program. A post-training assessment will inform you about the strengths and weaknesses of the program, provide valuable feedback to staff and faculty, and give you a basis for making improvements so that future trainings you undertake will be even more effective.

PRE-COURSE TASKS

ACTIVITY 15-A
Determine what types of information, measures, standards, and outcomes you will use to evaluate your training program.

ACTIVITY 15-B
Design forms, questionnaires, pre-tests and post-tests, or other instruments.

Associated Tool #40 Evaluation Form
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #42 Pre-Test
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #45 Post-Test
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #43 Worksheet for Program Modification
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #44 Clinician Questionnaire
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #60 6-month Follow-up Survey
(Source: Francis J. Curry National TB Center, San Francisco)
DAY-OF-EVENT TASKS

ACTIVITY 15-C
Ensure that the appropriate form(s) is/are included in the training portfolio or distributed to the participants.

ACTIVITY 15-D
Encourage participants to complete all of the feedback and evaluation materials. Allow time during the course for participants to write considered responses. Suggest that participants fill out session evaluations as they are given—not all at the end of the day. Explain to participants that turning in these evaluation forms are a requirement to receive CEs/CMEs.

ACTIVITY 15-E
Collect the feedback and evaluation materials at the end of the day or on the final day of a multiple-day training.

POST-COURSE TASKS

ACTIVITY 15-F
Review and summarize the evaluations.

ACTIVITY 15-G
Score the pre-tests and post-tests. Create a spreadsheet that shows cumulative and individual differences between pre-tests and post-tests, by total score and by questions. If many participants are missing the same questions in their post-tests this indicates either your faculty are missing that point or that the question is poorly written.

Associated Tool #56 Summary of Pre-/Post-Course Scores Per Participant
(Source: Francis J. Curry National TB Center, San Francisco)
ACTIVITY 15-H
Convene a meeting of the persons who were involved in planning and producing the training to discuss what went well and what could be improved. (For trainings where participants were program staff, a discussion with their supervisors three to six months following the course to assess longer-term impact can also be valuable.)

ACTIVITY 15-I
Prepare an evaluation report to summarize and document the evaluations, feedback, comments, and suggestions.

Associated Tool #55 Summary of Evaluation Data
(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 15-J
Distribute relevant sections of evaluation report to your training program planners, faculty members, and other appropriate individuals.

ACTIVITY 15-K
Send relevant materials to the organization that co-sponsored your event and/or provided units to participants.
ACTIVITY 15-L
Summarize reports to long-term evaluation tools the Clinician Questionnaire and Worksheet for Program Modification. You can use these answers as a baseline for improvement and survey the same participants at six months to see if your training has an effect on their practice.

Associated Tool #60 6-month Follow-up Survey
(Source: Francis J. Curry National TB Center, San Francisco)
Written and presentation materials are important parts of your training program. By providing relevant and well-designed information, you help participants understand what to expect of the training program, reinforce what is taught, and establish credibility for the program and the sponsoring agency. These materials also can function as a reference tool for those unable to attend the training. Development of the training materials, especially the course syllabus, can be the most time-consuming aspect of running a training program, but, if done with care, it pays substantial dividends.

Another key element of the course is the use of audiovisual materials to enhance the faculty presentations. Well-designed slides, case studies, overhead projections, and videos can add interest to the lectures and make them easier to comprehend. While some faculty members can provide their own audiovisual materials, others may need your assistance to develop effective visual aids.

This Background Guide describes the kinds of materials that are typically used to supplement a training program and provides some tips and guidelines for producing them.

COURSE SYLLABUS

The syllabus is the “take-away” product of your training efforts—a collection of materials that summarizes and supplements the course, providing participants with a valuable informational resource. For this reason, it is important to pay attention to ensuring that the syllabus content is accurate and up-to-date, the spelling and grammar are correct,
and the visual presentation is strong and attractive. The development of the course syllabus can be the most time-consuming aspect of training.

**WHAT IS INCLUDED IN THE SYLLABUS?**

**Materials for the presentations.** These could include presentation outlines, printouts of slides or other visuals, case studies, and other handouts provided by the faculty member who will make the presentation. Many presenters choose to use the PowerPoint format both for presentation and for publication. See Production Tips and Guidelines, below, for suggestions on producing presentation materials.

**Reprints of relevant articles.** Sometimes faculty members will request that particular articles be included in the syllabus. Your organization's library archives or resource files may include other articles that can supplement the information being presented. You can obtain information on-line from the website of the Center for Disease Control and Prevention (CDC), [http://www.CDC.gov](http://www.CDC.gov), such as the Morbidity and Mortality Weekly Report (MMWR), or search PubMed, a service of the National Library of Medicine, which includes over 14 million citations for biomedical articles ([at](http://www.ncbi.nlm.nih.gov/PubMed/)). You may want to include just the citation—not the whole article—to save space and money.

If articles are copyrighted, you may need to acquire a release from the publisher or author. If faculty cannot provide reprints (or citations) in time for the printing deadline, ask them to bring copies when they present their lecture.

**Introductory material.** These items provide a context for the materials in the subsequent sections. Typical introductory items would include:

- Title page. An introductory sheet that provides the name of the course, the date(s) and location, and information about the sponsoring agency

Associated Tool #37  Syllabus/Portfolio Title Page
(Source: Francis J. Curry National TB Center, San Francisco)
• Agenda. A schedule of each day’s program, with start and end times, title of the presentation or activity, and the name of the presenter

Associated Tool #16 Course Agenda
(Source: Francis J. Curry National TB Center, San Francisco)

• Objectives page. A sheet that lists the objectives for the course or tells participants what they can expect to have accomplished when they have completed the training

Associated Tool #17 Course Objectives
(Source: Francis J. Curry National TB Center, San Francisco)

• Faculty list. An alphabetical roster of all faculty members, including their names and affiliation(s) For some training programs, you may wish to include a brief biography.

Associated Tool #38 Faculty List
(Source: Francis J. Curry National TB Center, San Francisco)

• Faculty disclosure statement. This document which delineates faculty member’s commercial support, is a requirement for all CME (category 1) courses.

Associated Tool #22 Faculty Disclosure Statement
(Source: Francis J. Curry National TB Center, San Francisco)

HOW IS THE SYLLABUS PACKAGED?

The format and packaging of the syllabus depends on the amount of material being distributed to the training participants. For a brief training session with relatively few handouts, a folder cover with pockets may suffice. In most cases, especially if the program includes several presentations or a substantial volume of materials, the best presentation is a three-ring binder separated into subjects by tabbed dividers. Each presentation is given its own section, which should correspond to the arrangement of sessions on the agenda. The title page and other items that apply to the program as a whole can be placed in front of the tabs or given a section of their own behind the first tab.
TRAINING SESSION PORTFOLIO

While the syllabus provides information about the subject of the training, the portfolio focuses on the training day itself and includes materials that will help participants gain the most from the time they are investing. The portfolio is given to each participant along with the course syllabus and nametag when they sign-in on the day of the training.

A pocket folder containing the individual items makes a convenient presentation. An identifying label can be placed on the cover. The specific materials that should be included will depend on the nature of the training session, the location, and the sponsoring agency. Typical choices are listed below:

- Title page. A title page identical to the one in the syllabus
  
  Associated Tool #37 Syllabus/Portfolio Title Page  
  (Source: Francis J. Curry National TB Center, San Francisco)

- Credit information. A page that includes: wording required by the credit-granting organization regarding the awarding of units; course requirements; the number of CME or nursing CE units available
  
  Associated Tool #39 Credit Information page  
  (Source: Francis J. Curry National TB Center, San Francisco)

  Associated Tool #61 Wording for CE Certificate  
  (Source: Francis J. Curry National TB Center, San Francisco)

- Pre-test. Questions should reflect learning objectives
  
  Associated Tool #42 Pre-test  
  (Source: Francis J. Curry National TB Center, San Francisco)

- Participant list. An alphabetical roster of all participants attending the course, including their name, position title, workplace, and city. For smaller courses, it also can include email addresses and telephone
and fax numbers. This helps participants to keep in contact with each other and promotes ongoing networking opportunities.

- Evaluation form. A questionnaire to elicit participant feedback on the effectiveness of the program and faculty

**Associated Tool #40 Evaluation Form**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Associated Tool #45 Post-test**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Associated Tool #44 Clinician Questionnaire**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

- Restaurant list. A list of the locations and business hours of restaurants located conveniently to the site of the training session.

- Worksheet for practice or program modification. A questionnaire to help the participant develop an action plan for applying information from the training to his or her work responsibilities. This is primarily relevant for skill-building courses.

**Associated Tool #43 Worksheet for Program Modification**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

- Organizational brochure. Informational material about your organization or agency.

**PRE-TEST AND POST-TEST**

Using a pre-test and a post-test will help you determine the effectiveness of your training program by measuring how much the participants learn. If you are offering credit, pre-tests and post-tests may be required.
The two tests are identical except that they are copied on different colors of paper to differentiate them and have different titles (you may also choose to change the order of the questions). The pre-test is included in the portfolio; participants fill it out before the course begins. The post-test is distributed and filled out following the conclusion of the training. In order to maintain the integrity of the test, no pre-test or post-test should leave the training room. To help faculty prepare or develop their presentation, they should be provided with test questions relevant to their presentation.

After the training session, the scores are calculated and compared. It would be hoped that participants will score higher on the post-test, demonstrating an increase in their knowledge and understanding of the subject. If post-test scores are not generally higher than pre-test scores, it usually means either that presenter didn’t adequately cover subject or that the question was written poorly.

Associated Tool #42 Pre-test  
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #45 Post-test  
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #4 Co-Sponsored Course Checklist  
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #57 Pre-/Post-Test Frequently Missed Questions  
(Source: Francis J. Curry National TB Center, San Francisco)

OTHER HANDOUTS

There may be documents to be distributed at appropriate points during the training instead of being included in the syllabus or portfolio. The post-test is one example, as is the worksheet for program modification and some faculty members may prefer to hand
out particular materials, such as case study exercises, during their presentations rather than in advance.

Associated Tool #45   Post-test
(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #44   Clinician Questionnaire
(Source: Francis J. Curry National TB Center, San Francisco)

VISUAL AIDS

Visual aids are used by almost all training faculty to augment and enhance their presentations. These come in five main formats:

- Overhead projections
- PowerPoint presentations
- Photographic slides
- Flipcharts (to record group discussions)
- Videos, on tape or DVD
- Radiographs

Some faculty members may have appropriate visual aids on hand or be willing to create them for their own presentations. Others may request your assistance in obtaining or preparing what they need. It is important to determine early on what the faculty's expectations and requirements are so that you will have ample time to develop or obtain materials and arrange for the necessary projection equipment (which can be different for each format).

For all of the formats except videos, the individual slides can be printed on paper for inclusion in the course syllabus. Overheads and PowerPoint slides can be printed directly from the computer file in which they are created. For photographic slides that have not been transferred to a compact disk or DVD, it will be necessary to scan the
image into a computer to create a file; you may need a photo lab or a graphic designer to help with this process.

**Overhead projections.** Overheads are the easiest visual aids to create. A page that contains brief text, a chart or graph, or other information is printed from a computer or photocopied onto a clear acetate sheet. The sheet is laid on the lighted bed of the overhead projector, which projects the text or image onto the screen. A disadvantage is that the projector must be placed at the front of the room with the instructor, where it can be visually intrusive. An advantage is that the transparency can be written on by faculty as it is viewed by participants.

**PowerPoint presentations.** These are slide shows produced on a computer using the Microsoft PowerPoint program or similar software. The slides can incorporate text, many types of graphics, and even video and sound effects. If designed well, they can result in versatile and dynamic presentations. The slides are loaded into a laptop computer, which is hooked up to an LCD projector so that the images can be projected onscreen in a size large enough to be seen easily by the audience.

**Associated Tool #24  PowerPoint Slide Template**
(Source: Francis J. Curry National TB Center, San Francisco)

**Photographic slides.** Some presenters prefer to use slides in the traditional format—images on 35mm film in cardboard or plastic mounts. For these you will need a standard slide projector with carousel trays to hold the slides.

**Flipcharts.** These can be useful for capturing ideas and points raised during group discussions. They work best in smaller groups where visibility of the flipchart and what is recorded upon it is less likely to be an issue.

**Videos.** The prohibitive amount of effort and expense involved means that videos are rarely custom-produced for a presentation. But your faculty may know of existing videos, either on tape or on DVD, that are suitable for their presentations and can be borrowed or rented at low cost.
PRODUCTION TIPS AND GUIDELINES

Be sure to allow ample time for production of course materials. A timeframe of three months is not unreasonable. Confer with your printer or copy service on the production schedule and create a written timeline, working backward from the scheduled date of the training program and noting deadlines for accomplishing the various steps. These dates should correspond to those in your Training Program Action Plan and should include due dates or deadlines for:

- Arrival of all materials being provided by outside sources, such as faculty members
- Creation of original materials, including writing, formatting, editing, proofreading, and making corrections. Note: proofread everything twice (preferably by two different people)—this is critical to ensure quality
- Delivery of materials to the printer, copy service, or other vendors
- Receipt of proofs from the printer
- Return of the corrected proofs
- Receipt of second proofs after corrections are made
- Return of the approved proofs
- Printing or copying
- Ordering and delivery of binders, tabbed dividers, pocket-folder portfolio covers and other packaging items
- Assembling materials into the folders or binders
- Delivery of materials to the training site

**Binders.** 3-ring view binders are ideal for the syllabus as you can customize them inexpensively by inserting your own covers into the transparent windows on the front
and spine. Be sure to order binders with sufficient capacity to hold the syllabus materials and allow for pages to be turned comfortably.

**Covers.** Covers can be produced on plain paper and inserted into the window pockets of the binders for a custom look. A simple cover can be produced in small quantities with a laser printer. For a major training program with numerous attendees, you might prefer to have an attractive cover designed and printed. Placing the order for the cover along with the one for the tabbed dividers can be cost- and time-effective.

**Tabbed dividers.** The least expensive option is to use the off-the-shelf tabs and binders that are a standard item in office-supply stores. You can achieve a more professional presentation, however, with custom tabs printed with identifying information for each of your syllabus sections. Because they are laminated and printers need extra time to complete them, you may need to submit your order as much as six weeks in advance. Have the printer provide a proof. If everything looks good when you review it, sign the proof and send it back to the printer. If there are any problems (misspellings, etc.), return the proof with corrections and ask for a second proof.

**Associated Tool #34 Tab Order and Production Timeline**  
*(Source: Francis J. Curry National TB Center, San Francisco)*

**Course materials.** In most cases, faculty members will provide the materials for their individual presentations. Request the materials in the first confirmation letter you send to faculty members, setting a deadline for their receipt and provide instructions regarding the preferred formatting. You may wish to receive the materials as electronic files so that when possible you can reformat according to style guidelines that you establish to achieve greater consistency in the presentation. If the materials don’t arrive in a timely fashion, be persistent in following up with the faculty member until you have them in hand. Late materials can cause serious snags in the production process. It is essential that all materials are proofread twice (preferably by two different people) before being printed and distributed. See the PowerPoint Guidelines in this section.
**Article reprints/citations.** These should be made from the cleanest obtainable sources. Be sure to print the proper citation on the first page. If you prefer to print your syllabus with fewer pages, simply cite the article (include articles URL, if available).

**Supporting items** (introductory items for syllabus; portfolio contents; other handouts). Most of these materials are specific to each scheduled training program and thus will need to be produced each time. Even if you develop stock wording and formats (a good idea if you plan to conduct training programs regularly), it is good to insert a heading on the items that gives the name, date and location of the particular program. Many items can be prepared well in advance and included in the main production schedule. However, some of them, such as the participant list, can change up until the last minute and may require a quick, last-minute turnaround.

**PowerPoint presentations.** These guidelines will enable you to produce PowerPoint presentations that work effectively both on the screen and on the page. You may wish to provide the guidelines to faculty who will be preparing their own presentations:

- **Background.** A plain blue or white background works well, and the same background should be used consistently throughout presentation. Avoid backgrounds that are distracting or that make text difficult to read.

- **Slide setup.** Either choose “on-screen show” or “35mm slides” for slide setup. The titles of each slide should be main points and the body should corroborate the title. Avoid being wordy; use key words or phrases only.

- **Font style.** Use an easy-to-read font like Times New Roman or Arial, and be consistent throughout slides. The size should be 40 to 44 points bold for the title and 30 to 32 points for the body of the text (do not use type smaller than 28 points). Choose a color for the type that contrasts sharply with the background; e.g., white or yellow type on dark blue background. On a blue background do not use deep colors, especially red, for the text.
• **Proofreading.** Before printing, proofread slides for grammar, spelling, clarity, and consistency. It is always best to have two different people do the proofreading. If you are doing a clinical course, you may ask a clinician to do a review of the content.

• **Printing options.** To prepare printouts of PowerPoint slides to include in the course syllabus, go to the print setting and choose *handout*, print three slides per page on *black and white* or in *grayscale*. You can also choose *handout master* to format the page (page numbers, etc.).

**Associated Tool #24  PowerPoint Slide Template**

(Source: Francis J. Curry National TB Center, San Francisco)

**Visual aids.** If need be, a good photo lab or graphic designer can help you create materials or convert existing materials to a different format (e.g., PowerPoint slides to 35mm photographic ones or vice versa).

**SHIPPING TRAINING MATERIALS**

When conducting an off-site course, you must ensure that the course materials are shipped and delivered to the training site at least one day prior to the first day of training.

Most large printing companies can arrange to ship the finished materials directly from the production plant to the training location. Make the printer aware of your shipping budget and deadlines. Assign a staff member to ensure that the materials have been shipped on time and collect all relevant documents (such as FedEx or other courier receipts) in case a package needs to be traced.

When shipping to an off-site meeting facility, be sure that your site-contact knows when to expect the shipment and can ensure the security of the boxes between the delivery date and the first day of training. Ask the contact to notify you when the boxes arrive.
and arrange to have access to them early on the training day. Find out if the site personnel can assist you in moving the boxes to the training room.

Also, be sure to include mailing labels or courier documentation needed for shipping any extra or reusable materials back to your office after the training.
RESOURCES FOR FURTHER INFORMATION

The following sources vary in media types such as CD-ROM, books (manuals, self-study courses), videos, and websites.

The CDC Tuberculosis Information Guide

This CD-ROM contains electronic versions of most CDC publications and products. It provides information on the prevention, diagnosis, and treatment of TB (Centers for Disease Control and Prevention, 2001).

Audience: Advocates, community leaders, government agencies, health educators/communicators, health professionals, interest groups, nurses, physicians.

Format: CD-ROM

Language: English

Available from: CDC National Center for HIV, STD, and TB Prevention (NCHSTP). Materials can be ordered in a number of ways:

1) By accessing the online order form at http://www.cdc.gov/nchstp/tb
2) By calling the CDC voice and fax information system (recording) toll-free at 888-232-3228, then pressing options 2, 5, 1, 2, 2;
3) By faxing a request for material to the NCHSTP Office of Communications at 404-639-8910; or
4) By mailing a request to the CDC NCHSTP Office of Communications at 1600 Clifton Rd, NE, MS E-07, Atlanta, GA 30333. Request item #99-6879. and CDC National Prevention Information Network, PO Box 6003, Rockville, MD 20849-6003; 800-458-5231; Request inventory item #CDT1.

Tuberculosis

This CD-ROM contains 13 interactive tutorials about TB and a collection of approximately 600 images. It provides an overview of TB etiology, transmission, immunology, pathogenesis, epidemiology, prevention and control, clinical features, diagnostic tests, and treatment (Wellcome Trust, 1998).

Audience: Health professionals, physicians
Tuberculosis: Identification, Prevention, and Control

This CD-ROM provides information about TB transmission, latent TB infection versus active TB disease, the TB skin test, and other TB-related diagnostic tests (HealthSoft, 2000).

**Audience:** Health educators/communicators, nurses, occupational health and infection control workers, physicians

**Format:** CD-ROM

**Language:** English

**Available from:** HealthSoft, PO Box 536489, Orlando, FL 32853-6489; (800) 235-0882; [http://healthsoftonline.com/portal/index.asp](http://healthsoftonline.com/portal/index.asp)

Core Curriculum on Tuberculosis: What the Clinician Should Know

This curriculum was designed to present basic information about TB and is intended for use as a reference manual for clinicians caring for persons with TB. Continuing education credits available (Centers for Disease Control and Prevention, 2000).

**Audience:** Health professionals, nurses, physicians

**Format:** Manual, 139 pp

**Language:** English, Spanish

**Internet link:**

**Available from:** CDC National Center for HIV, STD, and TB Prevention (NCHSTP). Materials can be ordered in a number of ways:

1) By accessing the online order form at [http://www.cdc.gov/nchstp/tb](http://www.cdc.gov/nchstp/tb)
2) By calling the CDC voice and fax information system (recording) toll-free at 888-232-3228, then pressing options 2, 5, 1, 2, 2;

3) By faxing a request for material to the NCHSTP Office of Communications at 404-639-8910; or

4) By mailing a request to the CDC NCHSTP Office of Communications at 1600 Clifton Rd, NE, MS E-07, Atlanta, GA 30333. Request item #00-5763. and CDC National Prevention Information Network, PO Box 6003, Rockville, MD 20849-6003; 800-458-5231; [www.cdcnpin.org](http://www.cdcnpin.org/). Request inventory item #D417.

Self-Study Modules on Tuberculosis: Modules 1-5

This instructional packet includes a series of five print-based modules covering epidemiology, transmission, pathogenesis, diagnosis, and treatment of TB infection and disease (Centers for Disease Control and Prevention, 1995).

**Audience:** Health professionals, nurses, outreach workers, physicians

**Format:** Course (5 self-study modules)

**Language:** English

**Internet link:** [http://www.cdc.gov/nchstp/tb/pubs/ssmodules](http://www.cdc.gov/nchstp/tb/pubs/ssmodules)

**Available from:** CDC National Center for HIV, STD, and TB Prevention (NCHSTP). Materials can be ordered in a number of ways:

1) By accessing the online order form at [http://www.cdc.gov/nchstp/tb](http://www.cdc.gov/nchstp/tb)

2) By calling the CDC voice and fax information system (recording) toll-free at 888-232-3228, then pressing options 2, 5, 1, 2, 2;

3) By faxing a request for material to the NCHSTP Office of Communications at 404-639-8910; or

4) By mailing a request to the CDC NCHSTP Office of Communications at 1600 Clifton Rd, NE, MS E-07, Atlanta, GA 30333. Request item #00-6514.
Self-Study Modules on Tuberculosis: Modules 6-9

This instructional packet includes a series of four print-based modules addressing TB contact investigation, case management, and confidentiality. It also provides information on managing multidrug-resistant TB and on DOT (Centers for Disease Control and Prevention, 2000).

**Audience:** Health professionals, nurses, outreach workers, physicians

**Format:** Course (4 self-study modules)

**Language:** English

**Internet link:** [http://www.cdc.gov/nchstp/tb/pubs/ssmodules](http://www.cdc.gov/nchstp/tb/pubs/ssmodules)

**Available from:** CDC National Center for HIV, STD, and TB Prevention (NCHSTP). Materials can be ordered in a number of ways:

1) By accessing the online order form at [http://www.cdc.gov/nchstp/tb](http://www.cdc.gov/nchstp/tb)

2) By calling the CDC voice and fax information system (recording) toll-free at 888-232-3228, then pressing options 2, 5, 1, 2, 2;

3) By faxing a request for material to the NCHSTP Office of Communications at 404-639-8910; or

4) By mailing a request to the CDC NCHSTP Office of Communications at 1600 Clifton Rd, NE, MS E-07, Atlanta, GA 30333. Request item #99-6206.

Self-Study Modules on Tuberculosis 1-9 (Web-Based)

The Web-Based Self-Study Modules on Tuberculosis, available online only, are interactive courses with features such as animation, study questions, case studies, and links to other TB-related sites. Modules 1-5 address transmission and pathogenesis, epidemiology, diagnosis, treatment, and infectiousness and infection control. Modules 6-9 address contact investigation, surveillance and case management, patient adherence, and confidentiality. Continuing education credits available (Centers for Disease Control and Prevention).

**Audience:** Correctional personnel, health professionals, nurses, physicians

**Format:** Course (includes 9 modules)

**Language:** English

**Internet link:** [http://www.phppo.cdc.gov/phtn/tbmodules/Default.htm](http://www.phppo.cdc.gov/phtn/tbmodules/Default.htm)
Tuberculosis Education and Training Resource Guide

This resource guide provides a comprehensive list of TB materials available through the federal government, state health departments, and private distributors. The guide also lists Internet sites providing information on TB and includes contact information for TB-related organizations, state TB control offices, and organizations providing funding for TB-related projects (Centers for Disease Control and Prevention, 2003).

Audience: Health professionals
Format: Book, 294 pp
Language: English
Available from: CDC National Center for HIV, STD, and TB Prevention (NCHSTP). Materials can be ordered in a number of ways:

1) By accessing the online order form at [http://www.cdc.gov/nchstp/tb](http://www.cdc.gov/nchstp/tb)

2) By calling the CDC voice and fax information system (recording) toll-free at 888-232-3228, then pressing options 2, 5, 1, 2, 2;

3) By faxing a request for material to the NCHSTP Office of Communications at 404-639-8910; or

4) By mailing a request to the CDC NCHSTP Office of Communications at 1600 Clifton Rd, NE, MS E-07, Atlanta, GA 30333. Request item #99-6352. and CDC National Prevention Information Network, PO Box 6003, Rockville, MD 20849-6003; 800-458-5231; [www.cdcnpin.org](http://www.cdcnpin.org) Request inventory item #B035.

Tuberculosis Nursing: A Comprehensive Guide to Patient Care

This guide provides information about managing TB. It discusses the transmission, pathogenesis, and diagnosis of TB infection and disease, and provides information on patient adherence, contact investigation, and TB containment (National Tuberculosis Controllers Association, Inc., 1997).

Audience: Health professionals, nurses
Format: Book, 194 pp
Language: English
Needs Assessment Strategies for Health Education and Health Promotion (Health Planning and Promotion) By Gary D. Gilmore, M. Donald Campbell, Ph.D

This text provides practical, clearly described strategies for needs assessments in health education and health promotion activities. With clear examples for application within each chapter and thorough case studies, your students will find Needs Assessment Strategies to be a valuable tool in health education and health promotion.

Audience: Health professionals, nurses, physicians, health educators, outreach workers

Format: Book, 240 pp

Language: English

Available from: Check your local bookstore or order online

Satellite Primer on Tuberculosis: Modules 1-5

This videotape series provides basic information about TB for the health practitioner. The series, based on the self-study modules 1-5, covers such topics as transmission, epidemiology, diagnosis, treatment, and infectiousness of TB. Continuing education credits available (Centers for Disease Control and Prevention, 1995).

Audience: Health professionals, nurses, outreach workers, physicians

Format: 5 videotapes, 90 min each

Language: English

Available from: Alabama Department of Public Health, PO Box 303017, Montgomery, AL 36130-3017; 334 -206-5300
Satellite Primer Continued: TB Frontline Modules 6-9

This videotape series, based on the self-study modules 6-9, addresses TB contact investigation, contact management, and confidentiality. It also provides information on managing multidrug-resistant TB and DOTS. Continuing education credits available (Centers for Disease Control and Prevention, 2000).

Audience: Health professionals, nurses, outreach workers, physicians

Format: 3 videotapes, 1 hr each

Language: English

Available from: CDC Division of Tuberculosis Elimination, 1600 Clifton Rd, NE, MS E-10, Atlanta, GA 30333; 404-639-8135; http://www.cdc.gov/nchstp/tb and National Technical Information Service, 5285 Port Royal Rd, Springfield, VA 22161; 800-553-6847; http://www.ntis.gov/ Request item #AVA20848VNB3.


Website: http://www.umdnj.edu/ntbcweb/schoolnursetraining.html

Texas Department of Health Tuberculosis Education Center page

Website: http://www.tdh.state.tx.us/tcid/TB-Education-Ctr.htm

Centers for Disease Control and Prevention, National Center for HIV, STD, and TB Prevention, Division of Tuberculosis Elimination, Education / Training Materials

Website: http://www.cdc.gov/nchstp/tb/pubs/perm.htm

Centers for Disease Control and Prevention, National Center for HIV, STD, and TB Prevention, Division of Tuberculosis Elimination, Tuberculosis Education and Training Network

Website: http://www.cdc.gov/nchstp/tb/TBETN/listserv.htm
Florida Department of Health, Tuberculosis Information page

Website:  http://www.doh.state.fl.us/disease_ctrl/tb

National Institute of Allergy and Infectious Diseases

Website:  http://www.niaid.nih.gov/default.htm

An online resource for TB-related pamphlets, articles, and links to further resources. Call (301) 496-5717 for more information.

TB Education and Training Network

Website:  http://www.cdc.gov/nchstp/tb/Tbetn/default.htm

The TB Education and Training Network (TB ETN) was formed to bring TB professionals together to network, share resources, and build education and training skills. Currently, membership includes representatives from TB programs, correctional facilities, hospitals, nursing homes, federal agencies, universities, the American Lung Association, National TB Model Centers, and other U.S. and international organizations interested in TB education and training issues.

TB-EDucate Listserv

Website:  http://lists.cdcnpin.org/mailman/listinfo/tb-educate

TB-EDucate provides subscribers the opportunity to ask questions, share comments, and exchange information with other subscribers about tuberculosis education and training issues (TB-Educate is not meant to be a forum to answer medical/clinical questions). TB-EDucate is open to anyone who has an interest in these topics. Subscribers have the option of receiving immediate delivery of each message, or once-daily delivery of a digest containing all messages posted in a 24-hour period. The TB-EDucate listserv is sponsored by the Division of Tuberculosis Elimination (DTBE) of the Centers for Disease Control and Prevention (CDC) and the CDC National Prevention Information Network (CDC NPIN).

Centers for Disease Control and Prevention (CDC)
National Prevention Information Network (NPIN)

Website:  http://www.cdcnpin.org/scripts/index.asp

This site houses the nation’s largest collection of information and resources on HIV/AIDS, STD and TB prevention.
Francis J. Curry National Tuberculosis Center

The Francis J. Curry National Tuberculosis Center (CNTC) provides state-of-the-art clinical and program training to a national audience of health care providers. The goals of the continuing medical education component are to 1) improve the diagnosis and treatment of tuberculosis (TB) and TB infection; 2) expand screening and prevention strategies; 3) expand the application of current infection and environmental control concepts; 4) furnish and understanding of current laws covering the care of TB patients, and 5) improve TB control measures.

Training courses are provided at the San Francisco facility as well as nationwide to health care practitioners in public health settings, community-based agencies, government agencies, managed care organizations, and private practice. Courses consist of one to four-day trainings and distance-learning opportunities via satellite, teleconference, Web-based education, CD-ROM, audio-recording, video, and print-based materials.

Website: http://www.nationaltbcenter.edu/

Charles P. Felton National Tuberculosis Center at Harlem Hospital

The Charles P. Felton National Tuberculosis Center at Harlem Hospital is one of three model centers funded by the Centers for Disease Control and Prevention. It is a partnership of Harlem Hospital, Columbia University, Health & Hospitals Corporation, and New York City Department of Health. As a model center, our mandate is to contribute to the elimination of tuberculosis (TB) as a public health problem by creating and distributing training and education products for the appropriate diagnosis and treatment of TB and latent TB infection, and by developing and testing innovative programs.

The unique characteristics of the Harlem community have compelled the Center to focus on initiatives which are tailored to fit its needs, such as: providing comprehensive social support to reduce psycho-social barriers to treatment completion; developing and implementing new models of care that are sensitive to both patient and community needs; and educating and training persons who provide care to this kind of community. These programs have been conducive to the declining TB rates in Harlem and New York City, and have contributed to TB control efforts elsewhere.

Website: www.harlemtbcenter.org
National Jewish Medical and Research Center, An Educational Health Series
Website: www.njc.org/medfacts/tuberculosis.html

The New York City Department of Health and Mental Hygiene, Bureau of Tuberculosis Control