BACKGROUND GUIDE

TRAINING MATERIALS

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, 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 #46 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.