

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)

Associated Tool #45 Post-test

(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.