

# CHECKLIST FOR IMPLEMENTATION STEPS AND ACTIVITIES

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

## **PROGRAM PLANNING**

---

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

- 1-A. Identify which groups in your jurisdiction have the highest risk for LTBI and TB disease, based on local epidemiological trends.
- 1-B. Develop a community profile that describes your target groups in detail.
- 1-C. Assess your organization's existing capacity and resources for implementing an LTBI program.

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

- 2-A. Review ATS/CDC guidelines for targeted testing and treatment of LTBI.
- 2-B. Review your local LTBI treatment protocol or establish such a protocol if one is not currently in place.

- 2-C. Examine strategies, case studies, and information from this Toolbox and other sources to determine the approaches most applicable to your community and situation.

**STEP 3. DESIGN THE FRAMEWORK FOR YOUR LTBI PROGRAM**

- 3-A. Determine who should be involved in the development of the program framework and invite their participation.
- 3-B. Set up a process for considering questions and issues, making decisions, and achieving consensus.
- 3-C. Develop the framework for your LTBI program: purpose or mission, target populations, goals or desired outcomes, and program strategies.
- 3-D. Document and distribute the agreed-upon program framework.

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

- 4-A. Develop a preliminary financial plan and budget.
- 4-B. Develop a list of prospective sources for the additional necessary funding and obtain application information.
- 4-C. Develop and submit funding proposals.
- 4-D. Set up financial management systems.

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

- 5-A. Assign a staff person to be in charge of the implementation process.

- \_\_\_ 5-B. Design or adopt a checklist or action plan outline to use as a planning tool.
- \_\_\_ 5-C. Distribute the action plan to everyone who is responsible for activities or tasks and to other stakeholders as appropriate.
- \_\_\_ 5-D. Review and update the action plan regularly.

## **COMMUNITY AND PATIENT RELATIONS**

---

### STEP 6. ESTABLISH COLLABORATIONS WITH COMMUNITY PARTNERS

- \_\_\_ 6-A. Assess what you need and expect from community partners and what your organization can offer in establishing mutually beneficial collaborations.
- \_\_\_ 6-B. Identify prospective partners and assess the potential benefits and drawbacks of collaborating with each one.
- \_\_\_ 6-C. Contact prospective partners to propose the collaboration and explain the LTBI program: its purpose, importance, and objectives.
- \_\_\_ 6-D. Discuss and agree upon:
  - The scope of services to be offered
  - Anticipated costs and how they will be allocated among the partners
  - Each partner's roles, responsibilities, and expectations
  - The standards by which the partners will evaluate their collaboration

- 6-E. Negotiate and execute a Memorandum of Understanding (MOU) with each partnering organization to document the terms of your agreement.

STEP 7. PLAN YOUR COMMUNITY OUTREACH STRATEGIES

- 7-A. Research outreach strategies that have been demonstrated to be effective in reaching your target groups.
- 7-B. Explore possible ways that you might collaborate with community partners on your outreach efforts.
- 7-C. Develop an outreach action plan.

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

- 8-A. Identify your internal resources (i.e., bilingual staff) for communicating and working appropriately with members of the cultural, ethnic, and linguistic groups to which high-risk individuals in your jurisdiction typically belong.
- 8-B. Identify external resources that you might draw upon.
- 8-C. Arrange with the identified resources to obtain services and acquire materials that will help your program work effectively with the populations it serves.

STEP 9. PROVIDE FOR INCENTIVES AND ENABLERS

- 9-A. Research possible incentives and enablers that would meet the needs of your target groups.
- 9-B. Decide on an initial menu of incentives and enablers.

- \_\_\_ 9-C. Identify sources for the selected incentives and enablers and make the necessary arrangements to have them available for distribution.
- \_\_\_ 9-D. Establish guidelines and procedures for the disbursement of incentives and enablers.
- \_\_\_ 9-E. Set up referral mechanisms to link patients with programs, goods, or services that your program cannot provide.
- \_\_\_ 9-F. Plan for regular evaluation of your incentives and enablers.

## **SERVICE DELIVERY**

---

### STEP 10. PLAN THE LOCATION WHERE YOU WILL DELIVER SERVICES

- \_\_\_ 10-A. Decide where your services should be located by determining the neighborhoods and areas your target patients are most likely to reside, work, or visit.
- \_\_\_ 10-B. Assess your program to determine your space needs and how you will reconcile them with your budget.
- \_\_\_ 10-C. Decide on the space option that makes the most sense for your program: single stationary location, multiple locations, mobile unit, or space shared with community partners.
- \_\_\_ 10-D. Make the necessary arrangements to establish the terms and conditions of your use of the selected space.
- \_\_\_ 10-E. Design a site plan.

- 10-F. Determine what furnishings and equipment will be needed and develop an acquisition plan.
- 10-G. Engage suppliers to accomplish any work that needs to be done to make the space suitable for your program's use.
- 10-H. Arrange for your move into the completed space.

#### STEP 11. DEVELOP ADMINISTRATIVE PROTOCOLS

- 11-A. Review available models for administrative procedures.
- 11-B. Determine what modifications are needed to fit the models to your program.
- 11-C. Develop and document the specific administrative protocols that your program will use.
- 11-D. Distribute the completed protocols to staff.

#### STEP 12. DEVELOP CLINICAL PROTOCOLS

- 12-A. Review available models for clinical procedures.
- 12-B. Determine what modifications are needed to adapt the models to your program.
- 12-C. Develop and document the specific clinical protocols that your program will use.
- 12-D. Distribute the completed protocols to appropriate providers and staff members and provide training as necessary.

## STAFFING

---

### STEP 13. IDENTIFY AND PROVIDE FOR STAFFING NEEDS

- 13-A. Assess the staffing requirements of your LTBI program.
- 13-B. Develop or modify job descriptions to incorporate the LTBI treatment program responsibilities.
- 13-C. Determine what resources will be required for the staff (office space, telephone, equipment, etc.).
- 13-D. If new staff will be hired, develop and implement a recruitment action plan.

### STEP 14. TRAIN STAFF TO IMPLEMENT THE LTBI PROGRAM

- 14-A. Identify the training needs of your staff with regard to the LTBI program.
- 14-B. Create an action plan for conducting the training.
- 14-C. Set up a training schedule and handle necessary logistical arrangements.
- 14-D. Conduct the training program.

## EVALUATION

---

### STEP 15. DEVELOP TOOLS AND PROCEDURES FOR CONDUCTING REGULAR PROGRAM EVALUATIONS

- 15-A. Determine which measures, standards, and outcomes you will use to evaluate your LTBI program.
- 15-B. Develop and document procedures for conducting the evaluation and for collecting, analyzing, and reporting the data that will be used.
- 15-C. Set up a schedule for regular program evaluations.
- 15-D. Conduct the scheduled evaluations and assess the results.