

# MANAGING TUBERCULOSIS AT DISTRICT LEVEL

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A training course

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COURSE DIRECTOR'S GUIDE

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Tuberculosis Programme  
World Health Organization  
1994

**MANAGING TUBERCULOSIS AT THE DISTRICT LEVEL**  
**COURSE DIRECTOR'S GUIDE**

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## PLANNING AND ADMINISTRATIVE ARRANGEMENTS

Careful planning and strong administrative support are essential both before and during the training course for District Tuberculosis Coordinators. This section of the *Course Director's Guide* may be used as a checklist of the necessary plans and arrangements that need to be done in preparation for conducting this course.

As Course Director, you may not be directly responsible for doing all of the items on the checklist, but you should ensure that someone is doing them. Ask questions to determine whether arrangements are being made, or assign someone responsible for making them. When you know that the item has been completed, tick it on the list. The arrangements probably will not be completed in the exact order as they appear on this list. Add to this checklist any additional planning items you need to include.

## CHECKLIST FOR PLANNING AND ADMINISTRATIVE ARRANGEMENTS

### Initial Planning

1. \_\_\_\_\_ Select the general location for the course.
2. \_\_\_\_\_ Select the dates for the course and facilitator training and develop agendas. (See Annex A for scheduling the course and pages 15 - 17 for scheduling facilitator training.)
  - a. \_\_\_\_\_ 6 days selected for facilitator training to take place before participants' course.
  - b. \_\_\_\_\_ 10 days selected for the participants' course.
3. \_\_\_\_\_ Letter sent by Ministry of Health to the Regional Tuberculosis Coordinator asking him to identify District Tuberculosis Coordinators who need training. The letter:
  - a. \_\_\_\_\_ announces that a course for District Tuberculosis Coordinators on how to manage a National Tuberculosis Programme at the *district* level will be held and explains the purpose of the course
  - b. \_\_\_\_\_ mentions the length of the course and that individuals should make plans to attend the *entire* course
  - c. \_\_\_\_\_ describes the location and dates of the course
  - d. \_\_\_\_\_ clearly states the date by which course participants should be identified and to whom to send the names of those participants.
4. \_\_\_\_\_ Regional Tuberculosis Coordinator identifies District Tuberculosis Coordinators who need training.
5. \_\_\_\_\_ Identify and select facilitators so that there will be one facilitator for every five participants expected to attend the course.

6. \_\_\_\_\_ Select precise location for course and lodging, if needed (preferably in the same hotel or complex).
- Selection based on reported availability of:
- a. \_\_\_\_\_ transportation from participants' homes to course and return
  - b. \_\_\_\_\_ adequate lodging for all facilitators and participants
  - c. \_\_\_\_\_ transportation from lodging to course, if at different locations
  - d. \_\_\_\_\_ meal service convenient to lodging and course
  - e. \_\_\_\_\_ large room for seating all participants, facilitators, and visitors to the course
  - f. \_\_\_\_\_ smaller rooms for role plays, group feedback and individual feedback, if needed
  - g. \_\_\_\_\_ tables, chairs, adequate lighting, and flipchart stand with paper or blackboard for each of these small rooms
7. \_\_\_\_\_ Letters of invitation sent out to participants. The letters:
- a. \_\_\_\_\_ briefly describe the purpose and organization of the course
  - b. \_\_\_\_\_ clearly state desired arrival and departure times for participants and stress the importance of attending the *entire* course
  - c. \_\_\_\_\_ describe arrangements for travel
8. \_\_\_\_\_ Invite facilitators, explaining that they should make plans to attend the *entire* course, including the scheduled facilitator training *prior to* the course.
9. \_\_\_\_\_ Make arrangements for obtaining and providing adequate numbers of copies of the course materials and necessary supplies. (Necessary materials and supplies are listed on pages 8 and 9 of this guide.)
10. \_\_\_\_\_ Make arrangements for sending or transporting course materials and necessary supplies to the course location.
11. \_\_\_\_\_ Develop a course directory with names and addresses of all participants, facilitators, and the Course Director (to be distributed during the course) and make sufficient copies.

12. \_\_\_\_\_ Obtain sufficient course completion certificates (to be filled out during the course).
13. \_\_\_\_\_ Obtain sufficient copies of the Course Evaluation Questionnaire.

### **At the Course Location, Before the Course Begins**

**Note:** Someone should arrive at the course location early to ensure that the following arrangements are made. This person should plan to arrive a day or two before facilitator training and continue to make arrangements throughout that week. During the course he will need to work with local staff to ensure that things go smoothly and that the facilitators' and participants' work is not unduly interrupted.

14. \_\_\_\_\_ Determine whether course materials and necessary supplies have arrived at the course location.
15. \_\_\_\_\_ Make arrangements for adequate lodging for all facilitators and participants.
16. \_\_\_\_\_ Make arrangements for welcoming facilitators and participants at the train or bus station and hotel.
17. \_\_\_\_\_ Make arrangements for adequate rooms for conducting the course, such as:
  - a. \_\_\_\_\_ large room available during the course for seating all facilitators, participants and visitors
  - b. \_\_\_\_\_ smaller rooms available during the course for role plays, small group discussions, group feedback and individual feedback

Each room should have:

- \_\_\_\_\_ sufficient table or desk area for participants
- \_\_\_\_\_ additional table area for any resource materials
- \_\_\_\_\_ flipchart stand with paper or blackboard
- \_\_\_\_\_ adequate lighting and ventilation
- \_\_\_\_\_ freedom from distractions such as construction noises or loud music.

- c. \_\_\_\_\_ one room available for both the week of facilitator training and the duration of the course for a secretary and the course supplies
  - d. \_\_\_\_\_ one room in which to conduct facilitator training (can be same room as participant training)
18. \_\_\_\_\_ Make arrangements for meals and coffee or tea service.
  19. \_\_\_\_\_ Make final arrangements for participants to go on site visits. (See pages 11 and 12 of this guide for a description of how to plan the site visits.)
    - \_\_\_\_\_ select health facilities for site visits
    - \_\_\_\_\_ plan visit with person in charge of the health facilities
    - \_\_\_\_\_ arrange and confirm transport to and from site visits
    - \_\_\_\_\_ prepare schedule of visits
  20. \_\_\_\_\_ Make arrangements for reconfirming or changing train, bus, or car reservations for participants.
  21. \_\_\_\_\_ Finalize plans for opening ceremony with local authorities.
  22. \_\_\_\_\_ Provide facilitators with a schedule of facilitator training on the first day of training.
  23. \_\_\_\_\_ Finalize course schedule and reproduce it in sufficient quantity to give a copy to each facilitator and participant.
  24. \_\_\_\_\_ Organize course materials and supplies and place them in the appropriate rooms.

### During the Course

25. \_\_\_\_\_ Provide everyone with a course directory.
26. \_\_\_\_\_ Arrange for a course photograph, if desired, to be taken in time to be developed before closing ceremony.
27. \_\_\_\_\_ Make arrangements for closing ceremony.
28. \_\_\_\_\_ Prepare course completion certificate for each participant.

On the next page is a possible timeline for carrying out the items on this checklist.



**CHECKLIST OF INSTRUCTIONAL MATERIALS NEEDED AT THE COURSE**

Materials Needed	Number Needed
Facilitator Guide	1 for each facilitator
Set of Modules	1 for each facilitator 1 for each participant
District Tuberculosis Register Workbook	1 for each facilitator 1 for each participant
Set of Answer Sheets	1 for each participant

## CHECKLIST OF SUPPLIES NEEDED AT THE COURSE

Supplies needed for each person include:

- Name tag and holder or large index card (for participants' names)
- Ball point pen
- Pencil
- Eraser
- Highlighter pen
- Note pad
- Calculator, if participants will be using them on their actual jobs
- Calendar

Supplies needed for classroom:

- Flipchart pad with thick markers (black, red, blue, green)  
or
- Blackboard with a box of coloured chalk and a box of white chalk
- Pencil sharpener

## **SPACE AND SET-UP REQUIREMENTS**

### **The Room**

The room should have:

- enough table or desk area for participants to work individually (no more than two participants at one table, 2 metres in length)
- enough space in the room for participants to work in groups of two during the role plays, without disturbing the rest of the class
- a place to put the instructional materials and supplies listed in the Checklists on pages A-7 and A-8
- a table for the facilitators to sit, with extra chairs to provide individual feedback
- adequate light and air.

### **Preparation of the Room**

Before the participants arrive, set up the room:

- Arrange the chairs and tables in the room so that participants can easily see the flipchart or blackboard and each other for the group discussions.
- Arrange all instructional materials and supplies grouped in order of their use in the module on a table. Name tags and holders or index cards should be placed near the door where participants enter or on the tablets where they will be sitting.

### **Prepare a Space Where You Can Provide Individual Feedback**

- If there is not a separate table for the facilitators to sit, arrange several groups of two chairs in separate locations where facilitators can give participants individual feedback. This should be very close to the room where the course is taking place.

### **Prepare a Space Where You Can Lead the Group Discussion**

- Arrange a few groups of four to five chairs in separate locations where facilitators can lead a group discussion. For example, if there are 15 participants, arrange three groups of chairs. These groups should also be set up close to the room where the course is taking place (perhaps in separate classrooms).

## SITE VISITS

After participants complete the *Conducting Supervising Visits* module, there is an optional site visit to a health facility. Although the visit is optional, it is highly recommended. However, if it is not feasible to include this activity in the training, facilitators should lead participants in completing the checklist for a site visit.

The site visit will require careful scheduling and planning. In order to minimize crowding and confusion, it is best that the participants be divided into two groups. Group A will visit an urban health unit. Group B will visit a rural health unit. Decide which group each facilitator(s) will lead.

At each facility, participants will work in pairs and use the checklists they developed during the *Conducting Supervisory Visits* module. They can review forms (e.g., Tuberculosis Treatment Cards, Tuberculosis Identity Cards) and the District Tuberculosis Register, observe health worker performance, and talk with health workers about the work they perform. They can also talk with tuberculosis patients about the health education information they have received.

When there is a microscopy laboratory and/or pharmacy at the health unit, participants can work in small groups and use the checklist they developed for site visits to microscopy laboratories (in the *Supporting Laboratory Services* module). They can talk with the laboratory and pharmacy staff, review the Tuberculosis Laboratory Register, and look at the drug inventory.

### Arrange the Site Visits with the Person in Charge of the Facility

- Go to each health facility and microscopy laboratory (if applicable) in advance to meet with the person in charge.
- Describe the course and the background of the participants to the person in charge. Explain the purpose of the site visit. Also explain what the participants will do while they will be at the facility. Explain that the participants will practice conducting supervisory visits to obtain practical experience in such skills.
- Find out the best time of day for participants to visit. Then, *together with the person in charge*, decide how many participants should visit the facility at one time and what are the most convenient times for the visit. (Approximately **three-quarters of the day** should be allotted for the site visit. One quarter of the day will be spent in transport.)
- Arrange with the person in charge for a staff member to meet the group when they arrive and direct them to the proper location.
- Encourage the person in charge to notify his staff of the visit in advance and to tell them what to expect.

**Schedule the Visits**

- Select the day and times for the site visits.
- Arrange in advance for the transport that will bring participants from the course site to their destination and back. Confirm the transportation arrangements as often as local custom dictates.
- Prepare a schedule to show the following:

Group	Car/bus number	Destination	Time
			<i>leave course:</i> <i>arrive at facility:</i>  <i>leave facility</i> <i>arrive at course:</i>

## FACILITATOR TRAINING

### GENERAL STRUCTURE OF FACILITATOR TRAINING

Facilitator training occurs the week before the participants' course, *Managing Tuberculosis at the District Level*. It is conducted by the Course Director. Facilitator training is extremely important. The course materials are not entirely self-instructional, and participants will need the guidance of well-trained and supportive facilitators as they work through the modules.

During facilitator training, facilitator trainees will perform the teaching procedures outlined in the *Facilitator Guide* for each module. Practicing these procedures while they are learning the course content will prepare them to perform as facilitators. (At any time, the Course Director will answer questions about the content.)

### How to Demonstrate and Practice Teaching Procedures

The Course Director acts as a facilitator. He is demonstrating desired teaching behaviours when he introduces a module, leads a group discussion, provides feedback, and summarises a module.

A facilitator trainee acts as a facilitator who is speaking to a group of participants. He is both **practicing** the role he must later perform and **demonstrating** it for the other facilitator trainees when he introduces a module, leads a group discussion, provides feedback, and summarizes the module.

When the Course Director wants to demonstrate the procedure for providing individual feedback, he chooses two trainees to role play the procedure while the other facilitator trainees observe.\* One facilitator trainee acts as a participant and another acts as the facilitator. They sit in front of the group (positioned as a facilitator and participant would be during an actual course) so they can be observed. The facilitator trainee both **practices** the procedure for providing individual feedback and **demonstrates** it for the others. He asks questions to ensure that the participant understands the exercise, discusses the answers, and mentions all the major points specified in the *Facilitator Guide*.

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**\*Note:** Placing the two facilitator trainees in front of the group provides the Course Director with the opportunity to demonstrate that providing individual feedback is different from leading a group discussion. Previous experience has shown that the individual feedback procedure may be difficult to understand until facilitators have had an opportunity to observe and participate in it.

## Selecting Facilitator Trainees to Practice Teaching Procedures

Choose different facilitator trainees to practice introducing or summarizing a module, leading a group discussion, providing individual feedback and coordinating a role play. By the end of the facilitator training, every facilitator trainee should have practiced each type of procedure at least once. Annex B contains a grid to help you ensure that each facilitator trainee has adequate practice. Look at the grid at this time.

For the first few practice activities, select facilitator trainees who are familiar with the course materials or the techniques of being a facilitator, if possible. The facilitator trainees will provide a good demonstration for those people learning to be facilitators for the first time.

When individual feedback is practiced, the facilitator trainee will practice giving clear explanations of certain concepts and mentioning all the major points about an exercise. However, the questions and comments of the facilitator trainee acting as the participant are not as likely to be characteristics the facilitators will encounter during the actual course. When you select someone to act as a participant, ask him to demonstrate such characteristics as:

- fear of showing the facilitator his work
- confusion over the relationship of a previous exercise with the one currently being discussed
- reluctance to discuss an exercise at all
- the tendency to say he understands when all else indicates that he did not.

This demonstration will provide facilitator trainees with a more realistic, if exaggerated, picture of the difficulties they may face.

## OUTLINE THE SCHEDULE FOR FACILITATOR TRAINING

A possible schedule for facilitator training is provided on page 17. When choosing and adapting a schedule, the Course Director should keep the following points in mind:

- As a general rule, no practice, exercise or part of any module should be discussed before all the facilitator trainees have read and completed it.
- Approximately 2 hours on the first day should be reserved for introduction of the facilitators to one another, description of the course objectives, and explanation of the *Facilitator Guide*.
- The schedule should allow for sufficient time for thorough reading of each module and discussion of each practice and exercise. This should include discussions of technical issues needing clarification and practice in conducting group discussion, coordinating role plays, and providing feedback.

- The schedule should be flexible. Progress may be limited by the complexity of the exercises being discussed. On the other hand, discussions may be completed ahead of schedule, allowing facilitator trainees to begin work on the next module section or to be released early.
- One hour the last day should be reserved for closing remarks, which include discussion of the schedule for the course and site visits.

## HOW TO USE THE FACILITATOR TRAINING GUIDELINES

On pages 20 through 38 of this Course Director's Guide contains guidelines to use when you conduct facilitator training. Turn to page 22 and look at a sample page. Notice the words in the left hand column. These are key words to remind you of what you will say to the facilitator trainers. In the right hand column, all words in regular print font are for you to say out loud to the trainees. All words in *italics* are either directions for you to follow or answers to questions during group discussions.

## Possible Schedule for Facilitator Training

Day	Activity	Probable Working Hours
1	Opening Remarks	.5
	Discussion of Teaching Methods of the Course	.25
	Discussion of Roles, Duties and Responsibilities of a Facilitator	.5
	Discussion of Facilitator Techniques	.75
	Discussion of <i>Facilitator Guide</i>	.5
	<i>Introduction</i>	.5
	Discussion of Providing Feedback/The Master Progress Plotter	.5
Begin <i>Administering Treatment</i>	3	
2	Complete <i>Administering Treatment</i>	6.5
3	Discussion of Remaining Facilitator Techniques	.5
	<i>Registering Cases</i>	3
	<i>Ensuring Identification of Suspect Patients</i>	1
	Begin <i>Monitoring Treatment</i>	1.5
4	Complete <i>Monitoring Treatment</i>	3
	Begin <i>Quarterly Reporting on Case Finding</i>	3
5	<i>Quarterly Reporting on Treatment Outcomes</i>	4
	Begin <i>Maintaining Regular Drug Supplies and Other Materials</i>	2
6	<i>Supporting Laboratory Services</i>	2
	<i>Conducting Supervisory Visits</i>	2
	Closing Remarks	1

**FACILITATOR TRAINING  
GUIDELINES**

## Opening Session

**Welcome**

Welcome to facilitator training. There will be (*number*) participants attending this course, *Managing Tuberculosis at the District Level*, from (*date*) to (*date*). The course is designed for District Tuberculosis Coordinators.

**Introduce yourself**

*Introduce yourself as the Course Director and write the name you wish facilitator trainees to call you in large letters on a blackboard or flipchart. Ask the facilitator trainees to introduce themselves and write the names they wish to be called on the list. They may also wish to give other identifying information.*

**Purpose of facilitator training**

There are (*number*) of you who have been selected to be facilitators to assist participants to learn the skills presented in the course materials. This is your week to prepare. You will read through the course modules and complete all the practices and exercises. You will also go through the Facilitator Guide.

**About the course**

Participants will complete the course by working individually through an Introduction and 9 modules. They will come to a facilitator for review of their practices and exercises. (We will discuss how to provide individual feedback later.) Before the course begins, you will distribute a course schedule. Tell participants that the schedule is approximate. They will not be rushed through materials. They will proceed at their own pace.

*Distribute copies of the Course Agendas (See Annex A). Explain that the agenda without the time estimates is for the participants. The agenda with the time estimates is only for facilitators so they will know approximately how long an activity should take.*

**Objectives of facilitator training**

**Objectives of facilitator training**

At the end of facilitator training, you will be able to:

- describe the roles, duties and responsibilities of a facilitator
- describe how to:
  - encourage interaction in the classroom
  - keep participants involved
  - keep group discussions focused and lively
  - manage any problems

- reinforce participants' efforts
- relate modules to participants' jobs
- assist co-facilitators

- introduce a course module using the discussion points in the Facilitator Guide
- summarise a course module using the discussion points in the Facilitator Guide
- lead a group discussion using the discussion points in the Facilitator Guide
- provide individual feedback according to the Facilitator Guidelines
- coordinate a role play according to the Facilitator Guidelines
- speak audibly and clearly
- use eye contact when speaking with students
- answer participants questions about the course content or obtain assistance from a co-facilitator or Course Director
- describe what to do when participants are working

### **Schedule for facilitator training**

### **Schedule for facilitator training**

*Cover the following items (you might want to put them on a flipchart):*

1. *Class hours*
2. *Tea breaks and lunch breaks*
3. *Available facilities (e.g., toilets, kitchen)*

**Teaching methods based on several assumptions about learning****Teaching Methods of Course**

The teaching methods of this course are based on several assumptions about learning: *(You might want to write the key points on a flipchart before you begin.)*

1. Instruction should be performance-based.

Instruction should teach the student tasks he will be expected to do on the job. This course is developed based on analysis of a District Tuberculosis Coordinator's tasks. Each module addresses the knowledge and skills needed to perform these tasks.

2. Active participation increases learning.

Students learn how to do a task far more quickly and efficiently by actually doing it than by just reading or hearing about it. Retention is substantially greater in participants who practice a skill than in those who merely observe it. Active participation also keeps students interested and more alert. This course actively involves the participants in doing the exercises in the module and participating in group discussions.

3. Immediate feedback increases learning.

Feedback is information given to a participant on how well he is doing. If a participant does well on a practice or an exercise, and is reinforced immediately, he is more likely to retain what he has learned. Immediate feedback also allows misunderstandings to be corrected before they become strong beliefs, or before the student becomes further confused. In this course, the facilitators give immediate feedback on each practice and exercise, tailored to each participant's needs. It is provided through individual or group consultation.

4. Learning is increased when instruction is individualized.

Participants attending this course will learn at different speeds and in different ways. For maximum learning to occur, the instruction must be flexible enough to

allow each participant to proceed at a pace that is comfortable for him. Each participant should ask questions and receive explanations to the extent necessary for him to understand and acquire the skill and knowledge. This course is structured so that the participants are able to do the exercises at their own pace, and then discuss any problems or questions with a facilitator.

5. Positive motivation is essential if learning is to take place.

Participants must want to learn for instruction to be effective. Most of the time, participants come to this course anxious to learn and highly motivated. Facilitators help the participants to maintain this motivation by providing prompt feedback, reinforcing them for their work on the practices and exercises, ensuring that they understand each practice and exercise, and encouraging them in group discussions.

**Roles, duties and responsibilities of a facilitator**

**Group discussion**

**Rules, Duties and Responsibilities of a Facilitator**

*Distribute the Facilitator Guide.* Ask facilitator trainees to read pages A-1 through A-4 of the guide -- an elaboration on the roles, duties and responsibilities of a facilitator. Tell them there will a group discussion to review the major points they have read.

**Group Discussion**

After each facilitator trainee has read the appropriate pages, lead a group discussion on the roles, duties and responsibilities of a facilitator.

**ASK:** What are the three main roles of a facilitator?

*A facilitator should instruct, motivate, and manage.*

**ASK:** What are the duties of a facilitator in instructing the participants?

- *Introduce each module.*
- *Make sure each participant understands how to work through the materials and what he is expected to do in the practices and exercises.*
- *Answer the participant's questions.*
- *Make clear any information that the participant finds confusing.*
- *Promptly evaluate each participant's work and give correct answers.*
- *Guide group discussions and role plays.*
- *Identify weaknesses in a participant's understanding and skills, and provide explanations or practice to correct them.*
- *Help participants understand how to apply the skills taught in the course to practical problems in actual situations found in their district.*
- *Lead group discussions at the end of each module.*

**ASK:** How should a facilitator effectively answer participants' questions?

*A facilitator should respond positively to questions. He should avoid facial expressions and comments that convey the question is trivial. He should always take enough time with each participant to answer the questions fully so that both he and the participant are satisfied. If a facilitator cannot answer a question, he should say so, and then get help from others in the group or later from asking a colleague.*

**ASK:** What are the responsibilities of a facilitator in motivating the participants?

- *Demonstrate enthusiasm for the topics covered in the course and for the work that the participants are doing.*
- *Compliment each participant for correct answers, improvements, or progress.*
- *Encourage participants to explore how the topics apply to their district activities and how the skills will help them improve the target cure rate for New pulmonary smear-positive patients.*

**ASK:** What are the responsibilities of a facilitator in managing the participants?

- *Make sure participants have access to the correct supplies and materials when they need them.*
- *Make sure there are no other major obstacles to learning (such as too much noise, not enough light, or not enough work space).*
- *Monitor the progress of each participant.*

**Facilitator techniques****Facilitator Techniques**

The Facilitator Guide has some practical techniques for motivating and managing participants. Read pages L-3 through L-8. When you have completed the reading, we will have a group discussion to discuss the major points you have read.

**Group discussion****Group Discussion**

**ASK:** How can you encourage interaction in the classroom?

- *Interact with every participant in the class at least once during the first day or two of the course.*
- *Show interest in participants by seeing if they are having any problems with the modules.*
- *Always be available to help participants.*

**ASK:** How can you keep participants involved?

- *Frequently ask open-ended questions of participants.*
- *Answer participants' questions willingly.*
- *Encourage participants to ask questions when they have them rather than to hold the questions until a later time.*
- *Use names when you call on participants to speak and when you refer back to a previous comment.*
- *Always maintain eye contact with participant who is speaking.*

**ASK:** How can you keep group discussions focused and lively?

- *Present information conversationally rather than read it.*
- *Move around the room while speaking and use natural hand gestures.*
- *Speak clearly. Vary the pace and pitch of your voice.*
- *Write key ideas on a flipchart or blackboard as they are offered.*

- *Paraphrase and summarise frequently to keep participants focused and to keep discussions on track.*
- *Restate the original question to the group to get them focused on the main issue again.*
- *Do not let several participants speak at the same time.*
- *Thank participants whose comments are succinct and to the point.*
- *Try to encourage quieter participants to contribute to the group discussions.*
- *Ask to hear from a participant in the group who has not spoken before, or walk towards someone to focus attention on him and make him feel he is being asked to talk.*

**ASK:** How can you manage a participant who talks too much?

- *Walk towards the participant when he is talking to make him feel self-conscious.*
- *Walk away from the participant or turn your back to him to focus attention away from him.*
- *When the participant pauses, break in quickly and ask to hear from another member of the group.*
- *Record the participant's main idea on the flipchart or blackboard. As he continues to talk about the idea, point to it on the flipchart and say, "Thank you, we have already covered your suggestion." Then ask the group for another idea.*
- *Do not ask the talkative participant any more questions. Ask for an answer from another individual specifically.*

**ASK:** When interacting with participants, how can you appear non-threatening and reinforce participants' efforts?

- *Avoid use of facial expressions or comments that could cause participants to feel ridiculed.*
- *Sit or bend down to be on the same level as the participant when talking.*

- *Do not answer hurriedly.*
- *Encourage participants to speak to you by allowing them time.*
- *Appear interested in what they have asked or suggested.*

**ASK:** When should you reinforce participants?

*When they:*

- *try hard*
- *ask for an explanation of a confusing point*
- *do a good job on a practice or an exercise*
- *participate in group discussions*
- *help other participants.*

**ASK:** How can you relate the course modules to participants' jobs?

- *Discuss the application of new concepts to real problems.*
- *Ask participants to tell the group their responsibilities at the district level.*
- *Ask participants whether they can use the skills taught in the course and discuss any potential difficulties in implementation.*

**ASK:** How can you assist co-facilitators?

- *If one facilitator is leading a group discussion, record the important ideas on the flipchart or blackboard, and check the Facilitator Guide to make sure all points have been discussed.*
- *Remain in the room even if you are not leading a group discussion or introducing a module.*

**Review of  
Facilitator  
Guide****Group  
Discussion****Review of Facilitator Guide**

Read pages A-5 through A-9 in the Facilitator Guide. We will then have a discussion about you have read.

**Group Discussion**

You are strongly encouraged to use the Facilitator Guide throughout the course. It contains valuable information that will enable you to provide adequate feedback to participants, lead group discussions, and introduce and summarise modules.

**ASK:** What does the Facilitator Guide contain?

*It contains a list of procedures to be done by the facilitator and the participants to complete the module, "Detailed Guidelines" which describe specific actions a facilitator should take and points to cover in discussions, and answer sheets for each practice and exercise. (\*\*\*\*You might want to point out an example of each in the facilitator guide.\*\*\*\*)*

**ASK:** How should you prepare to be a facilitator?

- *Read the facilitator and participant material as it will be presented in the course. (We will do this during Facilitator Training.)*
- *Think about sections participants may find difficult and questions they may ask.*
- *Plan ways to help with difficult sections and how to answer potential questions and concerns.*
- *Think about the skills taught in the modules and how they can be applied to the participants' jobs. Add these to the points to make in the introduction and/or summary of each module.*
- *Plan questions to ask participants so that they will also think about how the skills can be applied in their districts.*
- *Make sure the required instructional materials and supplies are at the course location.*

**ASK:** What instructional materials are needed at the course?

*1 Facilitator Guide for each facilitator, 1 set of modules and 1 District Tuberculosis Register Workbook for each participant and facilitator, and 1 set of answer sheets for each participant. (\*\*\*\*The Course Director is ultimately responsible for ensuring these instructional materials are at the course.\*\*\*\*)*

**ASK:** What supplies are needed at the course?

*Each participant would need a: name tag and holder or large index cards, ball point pen, pencil, eraser, note pad, calculator (if participants will be using them on their actual jobs), and calendar. For the classroom, the following is needed: flipchart pad with thick markers or a blackboard with box of coloured and white chalk, and a pencil sharpener. (\*\*\*\*The Course Director is ultimately responsible for ensuring these supplies are at the course.\*\*\*\*)*

**ASK:** How should the room be set up for the course?

*The room should have enough table or desk area for participants to work individually (no more than two participants at one table, two metres in length) and in groups of two for the role plays. The workspace for the participants should be arranged so that they can easily see the flipchart or blackboard and each other for the group discussions. There should be a table to put the modules, answer sheets, and District Tuberculosis Register Workbook, a table and chairs for the facilitators to use with extra chairs to provide individual feedback, and adequate light and air. There should also be separate locations set up (preferably classrooms) for group discussions.*

**Introduction  
Module****Introduction module**

*Distribute the Introduction Module.*

Look at the procedures for conducting the *Introduction* module on pages B-1 through B-5 of the Facilitator Guide. These are the procedures you will follow during the actual course. During this facilitator training course, I will follow these instructions. When you go on to the other modules, you will take turns introducing a module and practice using the Facilitator Guide.

*Introduce the Introduction module using the points in the Facilitator Guide. Discuss if there are any additional points that can be made. If there are additional points to be made, have facilitator trainees add them in their Facilitator Guide on page B-5. Then tell participants to read the module. When everyone is ready, lead the group discussion to summarise the module using the points in the Facilitator Guide.*

**How to  
provide  
feedback****Providing Individual Feedback**

One of the ways for us to determine whether participants have achieved a module objective is to see how successfully they have mastered a module practice or exercise. When a participant completes a practice or exercise, he will go to a facilitator for a review of his answers and to receive a copy of the answer sheet.

Individual feedback should be done privately, or in as private setting as possible if space allows. Read page L-10 in the Facilitator Guide on how to provide individual feedback. When you have completed the reading, we will have a group discussion on how to provide feedback.

**Group  
Discussion****Group Discussion**

**ASK:** What should you do before the feedback session?

*Before the feedback session, refer to the appropriate pages in the Facilitator Guide and review the purpose of the practice or exercise and what the answers are.*

**ASK:** What should you do if a participant's answer to a practice or exercise is incorrect?

*Ask the participant certain questions to determine why the error was made. Do not just give him the correct answer without finding out how he arrived at his answer. After the participant shows that he understands how to complete the exercise, ask him to work through the exercise or part of the exercise again.*

**ASK:** How can you reinforce a participant for good work?

- *Comment on his understanding of the concept or procedure.*
- *Show enthusiasm for ideas for application of the concept in his work.*
- *Tell the participant that the procedure he is learning will help him do a better job in his district.*
- *Tell the participant that you enjoy discussing these issues with him.*
- *Let the participant know that his hard work is noticed and appreciated.*

**ASK:** What should you do if you cannot answer a question adequately?

*Obtain assistance as soon as possible from another facilitator or the Course Director.*

**How to use  
the Master  
Progress  
Plotter****The Master Progress Plotter**

*Distribute copies of the Master Progress Plotter.*

After you review each practice, individual and group exercise that a participant has completed, mark off the appropriate box on the Master Progress Plotter to indicate that the participant has completed his work.

To use the plotter, write down the names of all the participants in the course in the spaces provided. Do this before the course begins. Then, when a participant completes a practice or an exercise, find the box on the progress plotter which indicates the module name and practice letter or exercise number and tick the appropriate box.

Using the Master Progress Plotter is a good way of identifying whether a participant has successfully completed his work. If you notice some participants who are lagging behind, go and see how they are progressing and if they have any questions or concerns. These participants might be having difficulty completing an exercise, or might have simply forgotten to ask a facilitator to review their answers.

The Master Progress Plotter is also a good tool for determining who is ready for the group discussions. When you see that (*number*) of the participants are ready for the group discussion, tick their names off next to the last exercise in that module, and tell them to go to a certain classroom (or area in the facility) for the review session.

## Administering Treatment

### Administering Treatment Module

*Distribute the Administering Treatment module. Introduce the module using the guidelines from the Facilitator Guide. Tell facilitator trainees that in order to demonstrate effective feedback, and to have them practice providing feedback, parts of facilitator training will be group paced.*

*Tell the trainees to begin reading and to stop after Practice A in the Administering Treatment module. You will demonstrate how to provide feedback to a facilitator trainee.*

*For Practice B, assign a facilitator trainee to provide feedback to another trainee. Use the Practice Assignment Grid (Annex B) to record which trainee has provided feedback.*

*You will lead the first group discussion (on treatment regimens). You will also coordinate the first role play (Exercise 2) so the trainees can observe how to coordinate a role play. For the second role play, select a participant to coordinate the role play for two trainees. The rest of the group will observe.*

*Depending on the size of the group of facilitator trainees and the number of Course Directors, the remainder of Facilitator Training can be with the entire group or smaller groups:*

- *If there is one Course Director and ten or less facilitator trainees, you can have the trainees continue to work as one group and individually read the modules at their own pace.*
- *If there is more than one Course Director and ten or more facilitator trainees, you can divide the trainees into smaller groups after Practice B. Each Course Director will facilitate the remainder of the course for his or her group.*

*For all other practices and exercises, trainees will use the Facilitator Guide to provide feedback for one another. To do this, wait for two trainees to complete a practice or an exercise. Assign one trainee to act as the facilitator to provide feedback and the other trainee to act as the course participant. Observe the feedback session and discuss with the trainees the teaching techniques used. Reinforce those trainees who demonstrate a thorough familiarity with the materials and who follow the steps in the Facilitator Guide.*

*At the end of the Administering Treatment module, you will lead a group discussion for your group of trainees.*

## Remaining facilitator techniques

## Group discussion

## Remaining Facilitator Techniques

*After the group discussion, ask participants to read pages L-9, L-11 and L-12 in the Facilitator Guide which cover what to do when participants are working, how to lead a group discussion, and how to coordinate a role play. Tell them there will be group discussion reviewing the major points of what they have read.*

### Group Discussion

**ASK:** What should you do when participants are working?

- *Look available, interested, and ready to help.*
- *Encourage participants to ask you questions whenever they need help.*
- *If important issues or questions arise when you are talking with an individual, make note of the issues or questions to discuss later with the entire group.*
- *If a question arises which you feel you cannot answer adequately, obtain assistance as soon as possible from another facilitator or the Course Director.*

**ASK:** How will you know which participants are ready for the group discussion?

*Use the Master Progress Plotter to identify participants who should be ready for the group discussion.*

**ASK:** What should you do before the group discussion?

- *Refer to the appropriate Detailed Guidelines to remind yourself of the purpose of the discussion and the major points to make.*
- *Tell the participants the purpose of the discussion.*

**ASK:** How should you reinforce participants for their good work?

- *Praise them for the list they compiled or the idea(s) they contributed.*
- *Comment on their understanding of the material.*

- *Praise them for their ability to work together as a group.*

**ASK:** What should you do to prepare the participants for a role play?

- *Assign the roles to the participants.*
- *Explain the roles to the participants.*
- *Allow participants time to prepare for the role play.*

**ASK:** What should you do during the role play?

*Observe portions of each group and only interrupt the role play if the participants are having tremendous difficulty.*

**Remaining modules**

**Remaining Modules**

*For the remaining modules, choose different trainees to introduce a module, provide individual feedback, and lead group discussions. Give trainees enough time to review the points in the Facilitator Guide. Use the Practice Assignment Grid to keep track of which trainees have practiced the different skills. (Write the names of the trainees down the Name of Facilitator column, and record each time a trainee introduces a module, conducts a group discussion, provides feedback, coordinates a role play, and summarises a module. Also indicate the module name and practice letter or exercise number, if applicable.) Provide facilitator trainees with immediate feedback of their performance.*

**Closing  
remarks  
to  
facilitators**

## **Closing Remarks to Facilitators**

*At the end of facilitator training, allow for approximately 1 hour to review the following:*

- *Briefly summarise the major duties of a facilitator.*
- *Discuss the site visits with facilitators:*
  - *Describe to the course facilitators the type of health units (rural an urban) participants will visit. Tell them the name of the health unit, the name of the person in charge of the facility, the size of the health unit, the area served by the health unit, the number and types of tuberculosis cases identified and treated at the health unit, whether intensive phase services are provided on an inpatient or ambulatory basis (or both), whether there is a microscopy laboratory and/or a pharmacy at the health unit, and if patients are diagnosed at the unit or referred for diagnosis.*
  - *Inform the facilitators that during these site visits they will coordinate the time participants' spend collecting information from health workers, patients, forms, registers, microscopy staff and pharmacy staff. Tell them to guide the participants, and not to lead the interviews. Facilitators should make sure the participants collect the information they need to describe their findings and make recommendations. Tell facilitators to observe how well participants are able to collect the information during the visit. If facilitators observe that participants are not collecting the information they need about the health unit, facilitators should suggest that they ask any questions that were overlooked. Tell facilitators that participants should be the ones asking the questions, not the facilitators.*
  - *Ask the facilitators to review the detailed guidelines in the Facilitator Guide for the each site visit exercise.*
  - *Explain to the facilitators that after the site visits, the facilitators will lead a group discussion to determine the group's findings and recommendations. The group should identify a spokesperson to present their*

*findings and recommendations to the other participants in the course. Each group should be given approximately one hour for the presentation.*

- *Answer any questions the facilitators may have about the field visit procedures.*

• *Tell facilitators that there will be facilitator meetings at the end of each day during the course. The objectives of these meetings is to find out what went well and what difficulties occurred during the day.*

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## RESPONSIBILITIES OF COURSE DIRECTOR DURING THE COURSE

### SUGGESTIONS FOR OPENING REMARKS TO COURSE PARTICIPANTS

As Course Director, you will want to make some opening remarks to all participants, probably during the opening ceremony. Keep in mind, however, that facilitators will provide a detailed introduction to the course at the beginning of the *Introduction* module. Your remarks should be of a more general nature, perhaps focusing on the importance of the course's objectives to the country's National Tuberculosis Control Programme. You may wish to adapt the following outline:

- A. Welcome and introduction
- B. Course focus on treatment
  - 1. To improve the cure rate of new smear-positive tuberculosis patients is this country's number one objective.
  - 2. The focus of the course is on treatment, rather than case-finding, because we cannot begin to expand case-finding until the cure rate is at least 85%.
- C. Importance of this course
  - 1. This course is designed to teach a District Tuberculosis Coordinator the functions of his job.
  - 2. The skills that you will learn in this course are very critical to the success of this country's National Tuberculosis Control Programme. The course will provide you with the skills to manage tuberculosis in your **districts**.
  - 3. The course will be hard work, but will be equally rewarding in that you will learn or improve skills which you can actually *use on the job* when you return home.
- D. Make any general announcements. For example, announce the schedule and any last minute room changes or other logistical information.

## **SUPERVISION OF FACILITATORS**

### **Observe Facilitators at Work**

Observe whether facilitators are providing feedback at the times suggested by the *Facilitator Guide*. Tactfully but firmly enforce the practice of providing feedback and commend those who do provide it. Be sure that on the first day of the course, facilitators have set up and are using a comfortable place for having feedback sessions. If not, help them identify a better spot, such as on a terrace near the room or in a hallway, and encourage them to move the necessary chairs there.

Ensure that the facilitators are mentioning all the major points of the module as specified in the *Facilitator Guide*.

Make notes on good techniques observed and techniques that could be improved.

### **Conduct Daily Facilitator Meetings**

It is very important to conduct facilitator meetings at the end of each day during the course. As Course Director, you need to know what went well, and what difficulties occurred during the day. Having daily facilitator meetings allows facilitators the opportunity to share ideas and concerns with each other. During these meetings, you can also identify solutions to any problems related to a participant's progress or related to difficult sections of the modules.

The following is an example of the types of questions to ask during the daily facilitator meetings:

#### Practices and Exercises

- Did all the participants come to you for review of their practices and exercises?
- Did the participants have questions about the practice or exercise when they came to you for review?
- Did they seem to understand the practice or the exercise?
- For the most part, did the participants have the correct answers to the practices and exercises?
- Was there enough time for you to answer participants' questions during the feedback sessions?
- Did the Master Progress Plotter help you to determine who did not complete a practice or an exercise?

### Group Discussions

- Did the participants actually discuss the material that was presented?
- Did all of the participants get involved in the group discussions?
- Do you think that the participants left the group discussion with a better understanding of the topic?
- Was there enough time for the group discussion?

### Facilitator Guidelines

- Did you use the Facilitator Guidelines for the opening and concluding remarks, the procedures for the practices and exercises, and the answers?
- How helpful were the guidelines in leading participants through the module?
- Was there anything that the guidelines should have included?

### Target Population

- Will the District Tuberculosis Coordinators **use** the tasks taught today? If not, who would most likely perform the tasks?

Discuss teaching techniques which the facilitators have observed or tried. Provide feedback to the facilitators on their performance. Mention a few specific actions which were well done (for example, providing participants with individual feedback, making all the major points of the module as listed in the *Facilitator Guide*). Mention a few actions which might be done better. (For example, provide more guidance through individual feedback instead of through discussions with the whole group.)

Recommend to the facilitators certain actions you consider important:

- Discuss problems with co-facilitators. If co-facilitators cannot solve problems together, they should go to the Course Director. The Course Director may be able to deal with these situations (for example, by setting up tutorials, discussing matters privately with the individuals).
- Speak softly while giving feedback to avoid disturbing people still at work. Use chairs out in the hall so that a participant and a facilitator can talk without disturbing the rest of the group.
- Suggest that discussions which are getting off the subject of that are too long be continued later (for example, during free time, over dinner).

- Interact informally with participants outside of scheduled class meetings, if feasible.
- Implement activities which make participants feel comfortable and involve them in the course.
- For participants who may not read the module or who do the practices and exercises as quickly as others, the facilitators should:
  - ensure that the participants understand the concepts and processes, even if they are not able to complete the practices or exercises,
  - avoid doing practices or exercises for them,
  - reinforce small successes, and
  - be patient (or ask another facilitator to help).

At the end of the facilitator meeting, review the main points to emphasize the following day. (Also remind facilitators of any changes to make the module more relevant to participants' jobs.) Make any necessary administrative announcements (for example, information about supplies, room changes, or transportation arrangements).

## CLOSING REMARKS TO COURSE PARTICIPANTS

On the last day of the course, the Course Director and facilitators should say some closing remarks to the participants. When deciding what to include, keep in mind that **people remember most what they hear last**. If there are certain points about the course that you want participants to remember, reiterate these points during the closing remarks. You may also want to review the objectives that participants met. This may prompt further discussions, or initiate questions. Tell participants what the next step is in terms of the country's National Tuberculosis Programme and what role they will play in it. Restate the importance of the participants completing the course and what they can now do with this additional knowledge.

## END-OF-COURSE EVALUATION

You may wish to use an evaluation questionnaire to determine participants' opinions at the conclusion of the course. A sample questionnaire appears on the next three pages. Review and revise this questionnaire as necessary to ensure that it is appropriate for evaluating the course as it has been conducted.

You may wish to add or delete specific questions of the evaluation. If you do choose to make such revisions, remember:

- Keep the evaluation as short as possible, and
- Only include questions if you will use the responses to the questions for a specific purpose, for example, to plan future courses, or to evaluate helpfulness of a particular activity.

## Evaluation Questionnaire

### Managing Tuberculosis at the District Level Training Course

To enable us to improve this course for future participants, please **fill out this questionnaire**.

1. For each task listed below, tick the appropriate box to indicate how well you think you will be able to perform the task in your job setting.

TASK	Very Successfully	Successfully	Somewhat Successfully	Unsuccessfully
Administering Treatment				
Registering Cases				
Ensuring Identification of Suspect Patients				
Monitoring Treatment Outcomes				
Quarterly Reporting on Case Finding				
Quarterly Reporting on Treatment Outcomes				
Maintaining Regular Drug Supplies and Other Materials				
Supporting Laboratory Services				
Conducting Supervisory Visits				



6. For each activity listed below, tick the appropriate box to indicate whether you thought the time spent on that activity was *too short*, *adequate*, or *too long*.

TYPE OF ACTIVITY	TIME SPENT WAS:		
	Too Short	Adequate	Too Long
Individual feedback			
Group discussions			
Interaction outside of scheduled class meetings			
Site visit			
Entire course			

7. Describe any other comments or suggestions you might have for improvement of the content or management of the course.

## **ANNEXES**

- Annex A: Scheduling the Course**
- Annex B: Practice Assignment Grid**
- Annex C: Master Progress Plotter**

## Scheduling the Course

For the Course Director's planning purposes, a possible schedule of participant training is on the next page. When adapting this schedule, the Course Director should keep in mind the following points:

1. Since participants work at different paces, the course schedule for participants should be flexible. It should not list precise times for completion of a module, but should indicate general time frames instead. For example, the schedule given to participants should contain specific times for lunch breaks, tea breaks and any free time, but only general times for other activities, for example, "Morning - Registering Cases". (See page 50.)
2. Homework is not recommended for participants. In some cases, participants may be asked to read a certain part of a module before class time, but they should not be put in situations where there is a temptation to do group homework on exercises. It is acceptable for participants to help one another during class, but outside of class there is a risk that some participants will simply be given the answers without the guidance and explanations that a facilitator could offer.
3. This 10-day schedule could begin on any day that seems appropriate for the customary local work week, transportation schedules to and from the course location, and other logistical concerns. A day or two of free time could be inserted wherever appropriate within the schedule.

## Possible Course Agenda

*(For Facilitators)*

Day	Activity	Probable Working Hours
1	Registration	
	Opening Ceremony (and reception)	1.5
	<i>Introduction</i>	1
	<i>Begin Administering Treatment</i>	3.5
2	<i>Complete Administering Treatment</i>	6
3	<i>Registering Cases</i>	4.5
	<i>Ensuring Identification of Suspect Patients</i>	1.5
4	<i>Monitoring Treatment</i>	6
5	<i>Quarterly Reporting on Case Finding</i>	6
6	<i>Quarterly Reporting on Treatment Outcomes</i>	6
7	<i>Maintaining Regular Drug Supplies and Other Materials</i>	6
8	<i>Supporting Laboratory Services</i>	2.5
	<i>Conducting Supervisory Visits</i>	3.5
9	Site Visit	6
10	Review site visits and plan recommendations	3
	Present site visit observations and recommendations	2
	Closing Remarks, Course Evaluation Questionnaire	1

## Possible Course Agenda

*(For Participants)*

Day	Activity	Time
1	Opening Ceremony and Reception	Morning
	<i>Introduction</i>	Morning
	Break	Morning
	Begin <i>Administering Treatment</i>	Morning
	Lunch	Noon
	<i>Administering Treatment</i>	Afternoon
	Break	Afternoon
	<i>Administering Treatment</i>	Afternoon
2	<i>Administering Treatment</i>	Morning
	Break	Morning
	<i>Administering Treatment</i>	Morning
	Lunch	Noon
	<i>Administering Treatment</i>	Afternoon
	Break	Afternoon
	Complete <i>Administering Treatment</i>	Afternoon
3	Begin <i>Registering Cases</i>	Morning
	Break	Morning
	<i>Registering Cases</i>	Morning
	Lunch	Noon
	Complete <i>Registering Cases</i>	Afternoon
	Break	Afternoon
	<i>Ensuring Identification of Suspect Patients</i>	Afternoon
4	Begin <i>Monitoring Treatment</i>	Morning
	Break	Morning
	<i>Monitoring Treatment</i>	Morning
	Lunch	Noon
	<i>Monitoring Treatment</i>	Afternoon
	Break	Afternoon
	Complete <i>Monitoring Treatment</i>	Afternoon

## Possible Course Agenda (Continued)

Day	Activity	Time
5	Begin <i>Quarterly Reporting on Case Finding</i>	Morning
	Break	Morning
	<i>Quarterly Reporting on Case Finding</i>	Morning
	Lunch	Noon
	<i>Quarterly Reporting on Case Finding</i>	Afternoon
	Break	Afternoon
	Complete <i>Quarterly Reporting on Case Finding</i>	Afternoon
6	Begin <i>Quarterly Reporting on Treatment Outcomes</i>	Morning
	Break	Morning
	<i>Quarterly Reporting on Treatment Outcomes</i>	Morning
	Lunch	Noon
	<i>Quarterly Reporting on Treatment Outcomes</i>	Afternoon
	Break	Afternoon
	Complete <i>Quarterly Reporting on Treatment Outcomes</i>	Afternoon
7	Begin <i>Maintaining Regular Drug Supplies and Other Materials</i>	Morning
	Break	Morning
	<i>Maintaining Regular Drug Supplies and Other Materials</i>	Morning
	Lunch	Noon
	<i>Maintaining Regular Drug Supplies and Other Materials</i>	Afternoon
	Break	Afternoon
	Complete <i>Maintaining Regular Drug Supplies and Other Materials</i>	Afternoon
8	Begin <i>Supporting Laboratory Services</i>	Morning
	Break	Morning
	Complete <i>Supporting Laboratory Services</i>	Morning
	Lunch	Noon
	Begin <i>Conducting Supervisory Visits</i>	Afternoon
	Break	Afternoon
	Complete <i>Conducting Supervisory Visits</i>	Afternoon
9	Site visit	All day
10	Review site visits	Morning
	Break	Morning
	Plan recommendations based on site visits	Morning
	Lunch	Noon
	Present site visit observations and recommendations	Afternoon
	Break	Afternoon
	Closing Remarks, Course Evaluation Questionnaire	Afternoon





